HR305

Configuration of Master Data

PARTICIPANT HANDBOOK
INSTRUCTOR-LED TRAINING

Course Version: 15
Course Duration: 5 Day(s)
Material Number: 50124110

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	*Example text*
Window title	*Example text*

Contents

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant
- Super / Key / Power User
- Data Consultant

UNIT 1 User Preferences

Lesson 1

UNIT OBJECTIVES

- Assign user roles in the SAP system
- Adjust user parameters to facilitate customizing activities
- Set up favorites in the SAP System

Unit 1
Lesson 1

Assigning User Roles

LESSON OVERVIEW

This lesson provides you an overview of how to assign roles to end users and adjust user parameters. In addition, it explains how to create favorites.

Business Example

As the HR Administrator, you need to assign roles to different end users. To increase efficiency, you also need to quickly access frequently used transactions. For this reason, you require the following knowledge:

- An understanding of the role concept
- An understanding of user parameters
- An understanding of favorites

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Assign user roles in the SAP system
- Adjust user parameters to facilitate customizing activities
- Set up favorites in the SAP System

User Roles

When you work within the SAP system, you are assigned a role based on your function in the company.

A role is a set of logically linked activities that a user performs in the SAP system. Roles are set up to enable working with user-specific menus.

After you are assigned a role, you can choose to create your user menu or use the standard SAP menu. The menu will enable you to access transactions, reports, or Web links on the system easily.

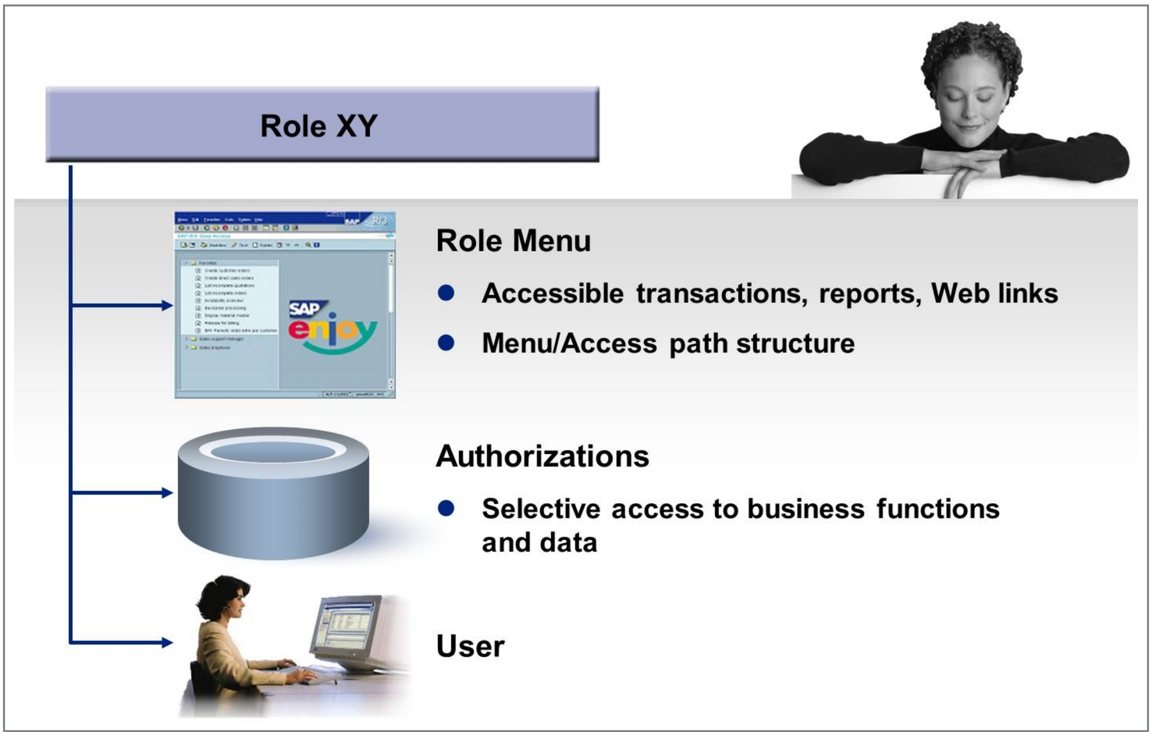
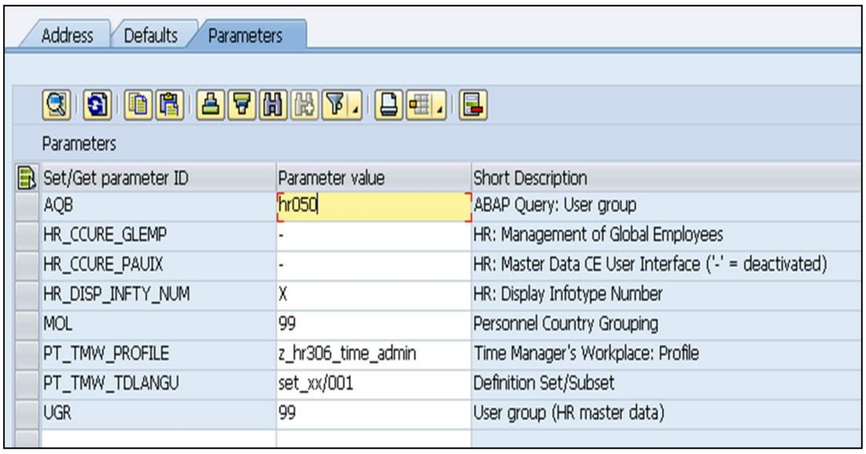


Figure 1: Role Concept

Based on your role and authorizations, you are authorized to access specific business functions and data. Therefore, authorizations determine the specific actions that you, as a user, can execute in the SAP system.

Note:
You assign a role to several users with the same task area.

User Parameters



Set/Get parameter ID	Parameter value	Short Description
AQB	hr050	ABAP Query: User group
HR_CCURE_GLEMP	-	HR: Management of Global Employees
HR_CCURE_PAUIX	-	HR: Master Data CE User Interface ('-' = deactivated)
HR_DISP_INFTY_NUM	X	HR: Display Infotype Number
MOL	99	Personnel Country Grouping
PT_TMW_PROFILE	z_hr306_time_admin	Time Manager's Workplace: Profile
PT_TMW_TDLANGU	set_xx/001	Definition Set/Subset
UGR	99	User group (HR master data)

Figure 2: User Parameters

Default settings can be created for every user that logs on to a SAP system. These default settings are referred to as user parameters, which help save time in data entry. These parameters can also be set to an individual's preferences.

Favorites

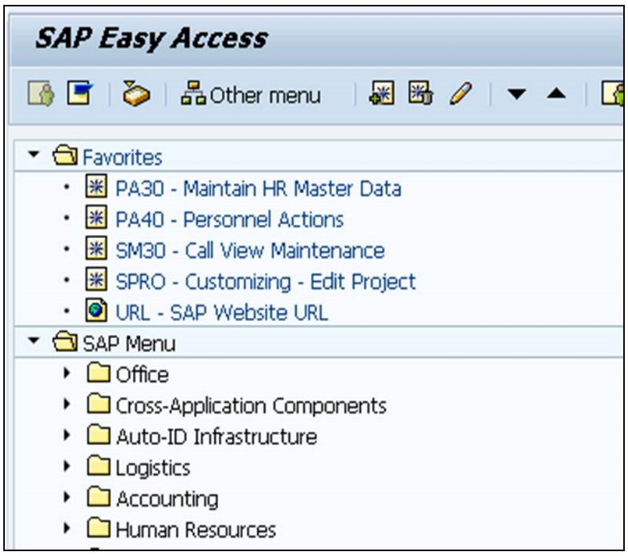


Figure 3: Favorites

If there are specific transactions that you need to access frequently, you can set up Favorites. By setting up Favorites, you can access transactions directly, instead of opening the complete tree structure.

You can personalize your initial *SAP Easy Access* screen in the SAP system by creating your own Favorites list consisting of the transactions, reports, files, and Web addresses that you most often use.

You can add Favorites by dragging items into the *Favorites* folder.

LESSON SUMMARY

You should now be able to:

- Assign user roles in the SAP system
- Adjust user parameters to facilitate customizing activities
- Set up favorites in the SAP System

Learning Assessment

1. Authorizations determine access permissions for users in the SAP system.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. You can assign a role to:

   Choose the correct answer.

   - [ ] A User profiles
   - [ ] B Users
   - [ ] C User parameters

3. You can predefine a field by setting:

   Choose the correct answer.

   - [ ] A User parameters
   - [ ] B User roles
   - [ ] C Help options

4. You can personalize the *SAP Easy Access* screen by creating your own Favorites list.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Unit 1

Learning Assessment - Answers

1. Authorizations determine access permissions for users in the SAP system.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

2. You can assign a role to:

   Choose the correct answer.

   [ ] A User profiles

   [X] B Users

   [ ] C User parameters

3. You can predefine a field by setting:

   Choose the correct answer.

   [X] A User parameters

   [ ] B User roles

   [ ] C Help options

4. You can personalize the *SAP Easy Access* screen by creating your own Favorites list.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

UNIT 2 Employee Master Data

Lesson 1

UNIT OBJECTIVES

- Record information for new employees in the SAP system

Unit 2
Lesson 1

Entering New Employee Data

LESSON OVERVIEW

This lesson explains how to execute a personnel action to hire an employee.

Business Example

As a personnel administrator, you are responsible for hiring new employees and maintaining employee data in the SAP system. For this reason, you require the following knowledge:

- An understanding of the structure of the company
- An understanding of the employee-related information that needs to be entered in the system
- An understanding of the transaction for executing personnel action

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Record information for new employees in the SAP system

Company Structure

To be able to hire employees for your company, you first need to understand the structure of your company.

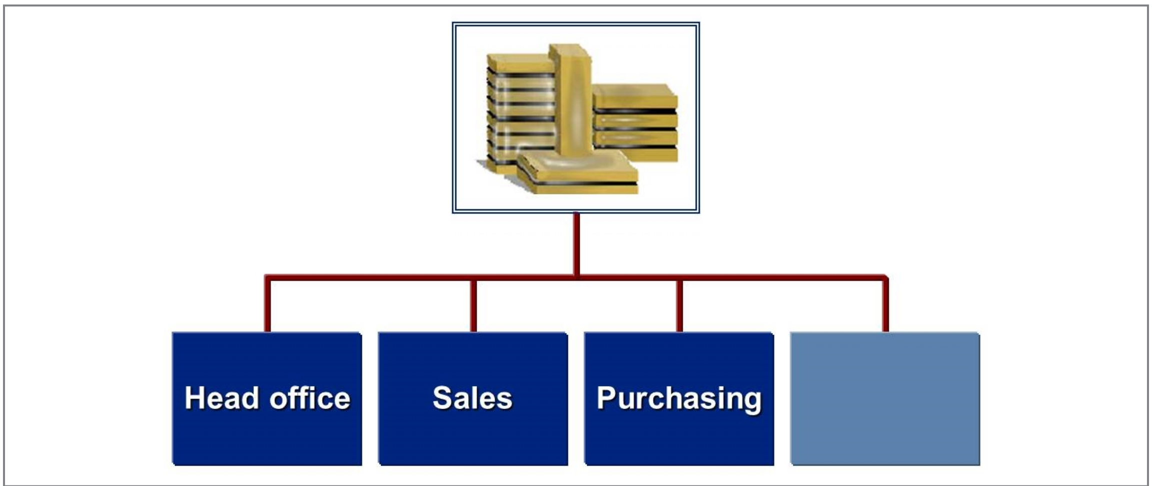


Figure 4: Enterprise Structure of a Sales Company

Your company has different departments, such as sales and purchasing. Each department has employees working in it. These employees hold a variety of positions such as managing director, sales director (one per location), internal sales persons, and purchasers.

Human Resource Data

Your company needs to hire external sales persons.

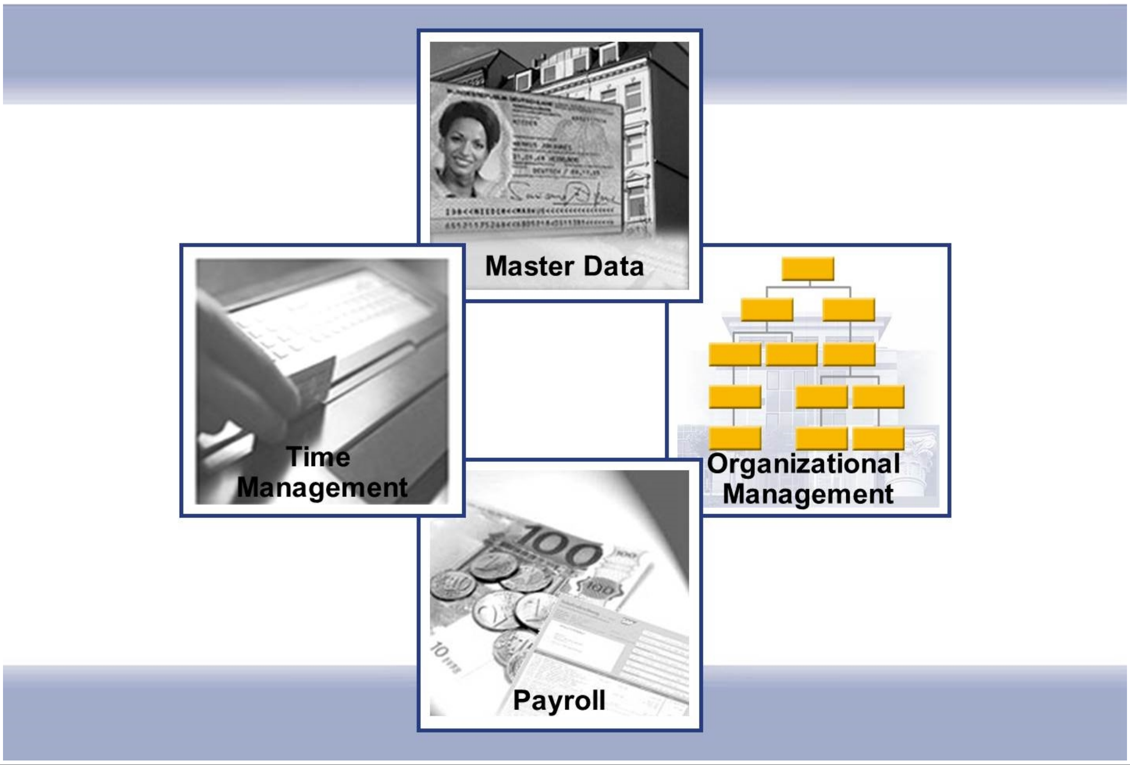


Figure 5: Human Resources Data

All the information related to employees in your company is stored in the SAP ERP system. Your company uses master data, time management, payroll, and organizational management to process all information related to these employees.

Employee Information

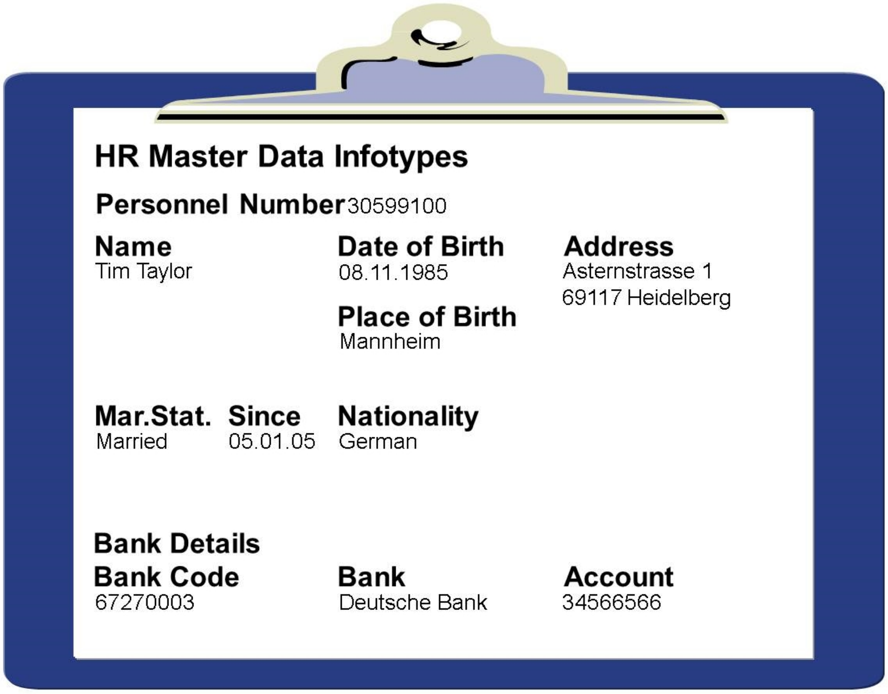


Figure 6: HR Master Data Infotypes of a New Employee

All the information about a new employee is stored in the HR master data infotypes. This master data is entered into the SAP system.

HR Master Data Infotypes of a New Employee: Additional Information

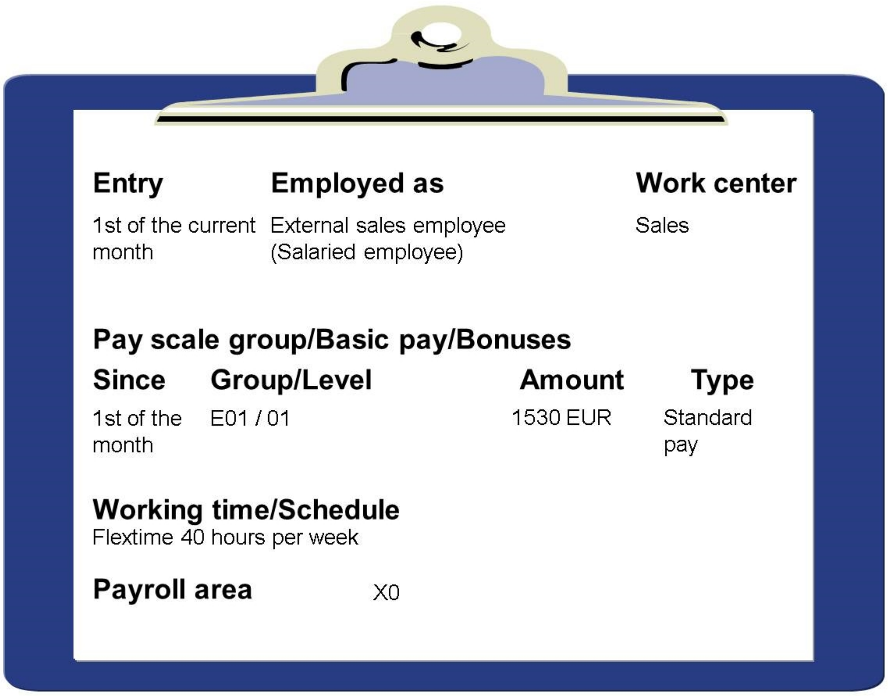


Figure 7: HR Master Data Infotypes of a New Employee: Additional Information

In addition to the employee's personal data, the HR master data infotypes include the following information about an employee:

- Organizational assignment
- Workplace data
- Salary amount and type
- Working time data

To retain the data of a newly hired employee, you can take the details from the employee's files where all the information about the employee is maintained. You can use a hiring action to input this data to the SAP system.

> Note:
> The master data in SAP Human Capital Management (HCM) is maintained in infotypes. Each infotype stores related information. For example, the Basic pay infotype stores pay elements.

Personnel Actions

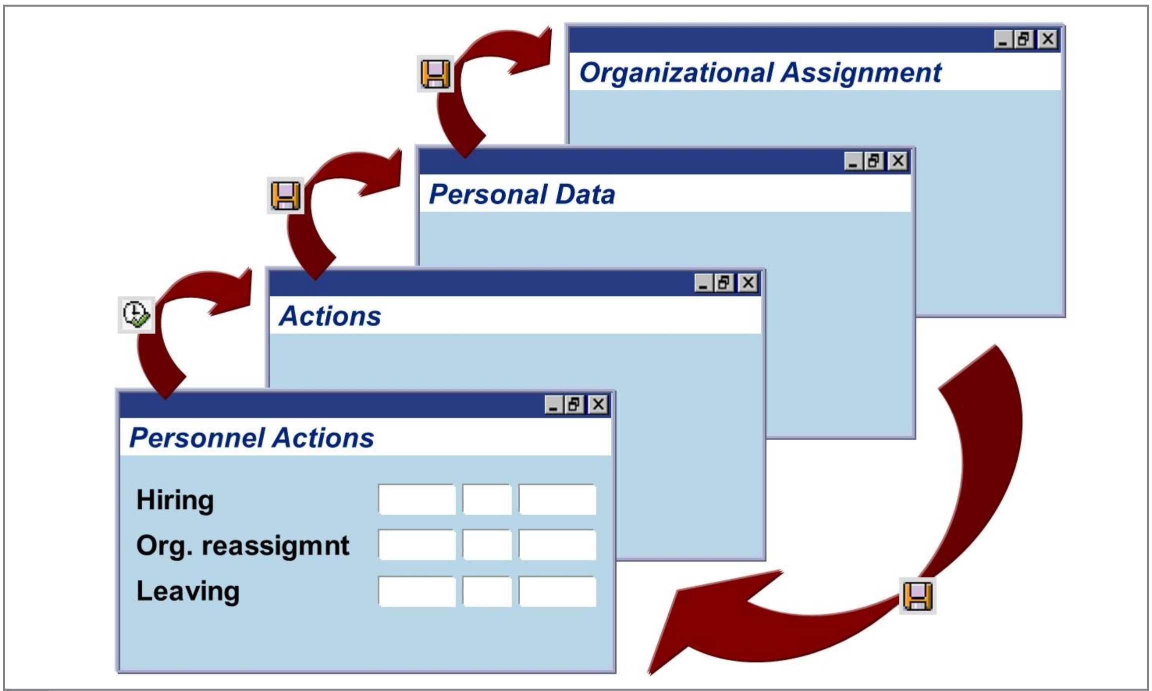


Figure 8: Using a Personnel Action to Hire an Employee

You use a personnel action to transfer an employee's hiring data into the SAP system. A Personnel action is a transaction that helps you record the HR processes such as hiring, promotion, transfer, and termination.

To enter the employee's data, you use the *Personnel Administration* menu to access the *Personnel Actions* screen. You then call the hiring action and enter the new employee's data. This function automatically takes you through all the infotypes you need to hire an employee.

After you enter all the relevant data for a particular infotype and save your entries, the system automatically takes you to the next input screen. When you complete the hiring action, the system takes you back to the initial *Personnel Action* screen.

Entry Screens for Hiring

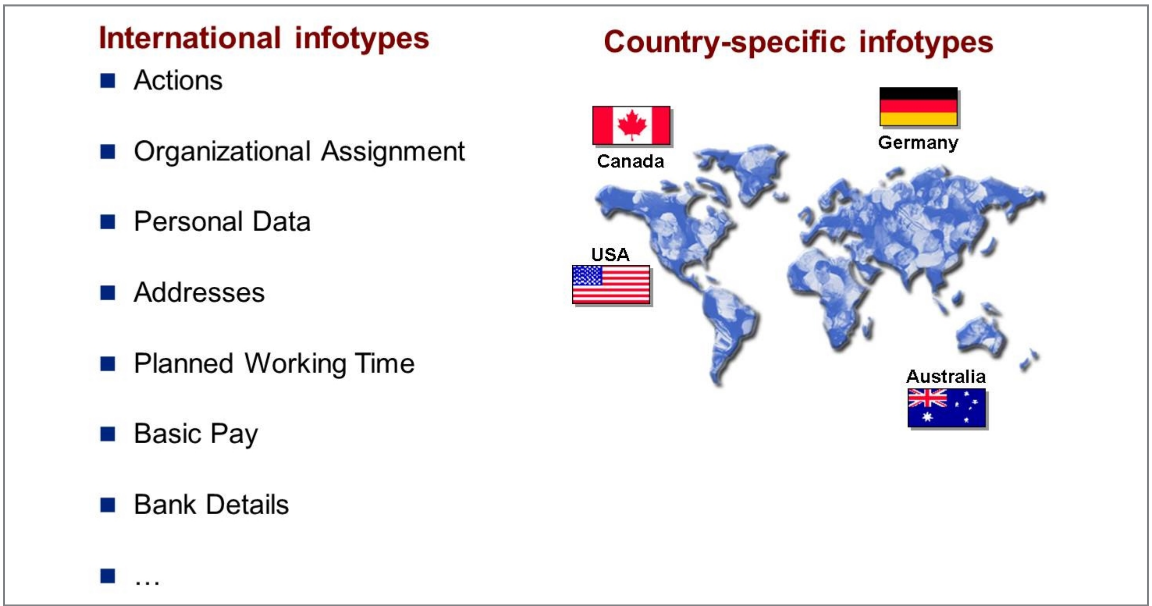


Figure 9: Entry Screens for Hiring

When you are hiring an employee, you use infotypes for a hiring action. The most important infotypes used in a hiring action include the following:

International Infotypes

- *Actions (Infotype 0000)*
- *Organizational Assignment (Infotype 0001)*
- *Personal data (Infotype 0002)*
- *Addresses (Infotype 0006)*
- *Planned Working Time (Infotype 0007)*
- *Basic Pay (Infotype 0008)*
- *Bank Details (Infotype 0009)*

Country-Specific Infotypes

- *Tax data*

LESSON SUMMARY

You should now be able to:

- Record information for new employees in the SAP system

Learning Assessment

1. Identify the information included about an employee in the HR master data infotypes.

   Choose the correct answers.

   - [ ] A Organizational assignment
   - [ ] B Customer data
   - [ ] C Salary amount and type
   - [ ] D Workplace data

2. Identify the element in which the master data in SAP Human Capital Management (HCM) is maintained.

   Choose the correct answer.

   - [ ] A Personnel Action
   - [ ] B Infotypes
   - [ ] C Personnel Administration

3. *Personnel Action* is a transaction that helps you record the HR processes such as hiring, promotion, transfer and termination.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. Identify the information included about an employee in the HR master data infotypes.

   Choose the correct answers.

   - [X] A Organizational assignment
   - [ ] B Customer data
   - [X] C Salary amount and type
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UNIT 3 Implementation Guide (IMG) Projects

UNIT OBJECTIVES

- Create a project IMG
- Customize limited views of IMG activities to facilitate project execution
- Configure tables in the implementation guide to meet customization requirements
- Delete existing table entries in the implementation guide
- Set end dates on existing table entries

Unit 3
Lesson 1

Creating Projects

LESSON OVERVIEW

This lesson shows you how to create and use a project implementation guide (IMG).

Business Example

Your company has recently acquired a manufacturing plant. As the HR administrator, you need to map the new company structure and update the changes in the system. For this reason, you require the following knowledge:

- A good understanding of the structure of the company
- A good understanding of the project IMG

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a project IMG

Projects

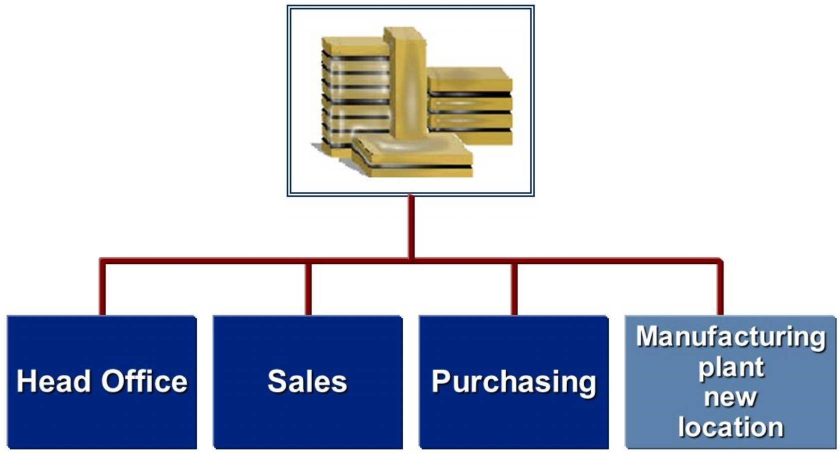

Figure 10: The New Structure in Your Company

With a manufacturing plant added at a new location, your company has a new structure.

There are also several employees working in the new production plant whose details you need to add to the SAP system. To add the employee details, you need to make a number of changes to the existing system. To do this, you first need to map the new enterprise structure to the SAP system and customize the existing system.

Mapping the New Enterprise Structure to the SAP System

You are a member of the project team involved in customizing the SAP system to meet the requirements of the new manufacturing plan. You need to follow certain project steps to map the new enterprise structure in the system.

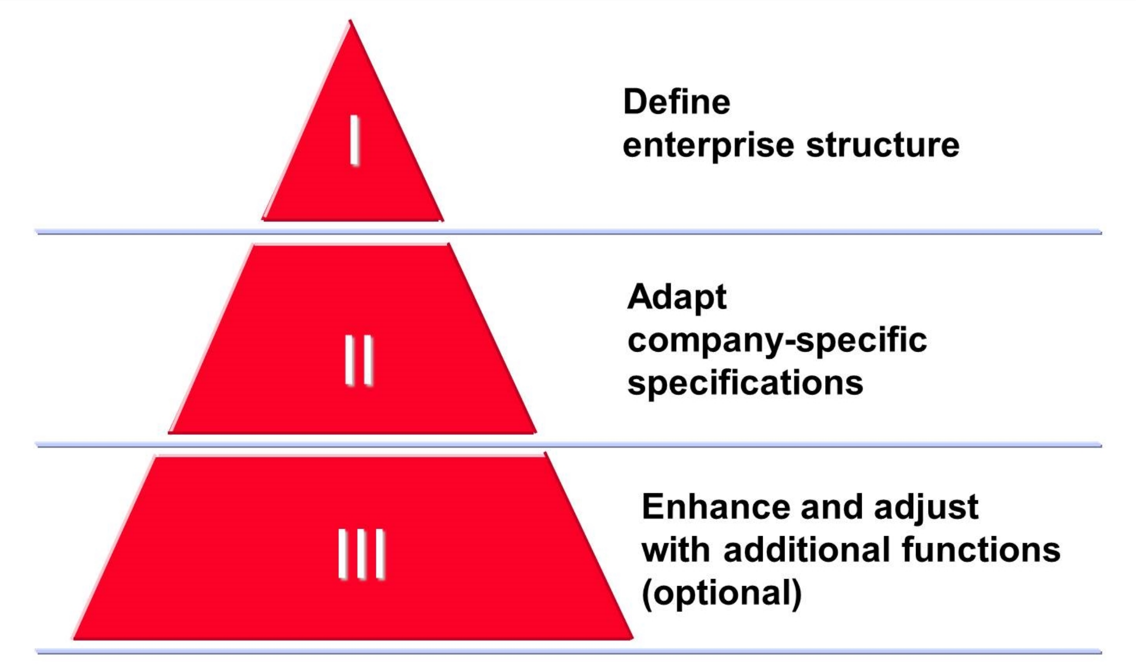

Figure 11: Project Steps to Map the New Enterprise Structure to the SAP System

Together with project team members from other application areas, you must first define the new enterprise structure.The next step is to make the changes in the system to meet the human resources requirements in the manufacturing plant.This system configuration is known as Customizing . You may also have to implement additional functions using program modifications.

Note:
The members of the project team make settings in the system to adjust the system to meet the company's requirements of a productive system.

The Implementation Guide

Figure 12: The Implementation Guide

To make sure that you carry out all the project steps required to create a project, SAP provides you with a tool, the IMG. You can use the IMG to store your customer-specific requirements in the system. This is Customizing.

Customizing is a method that supports the following situations:

- When implementing the SAP ERP system
- When enhancing the SAP ERP system
- With a Release Upgrade

Structure of IMG

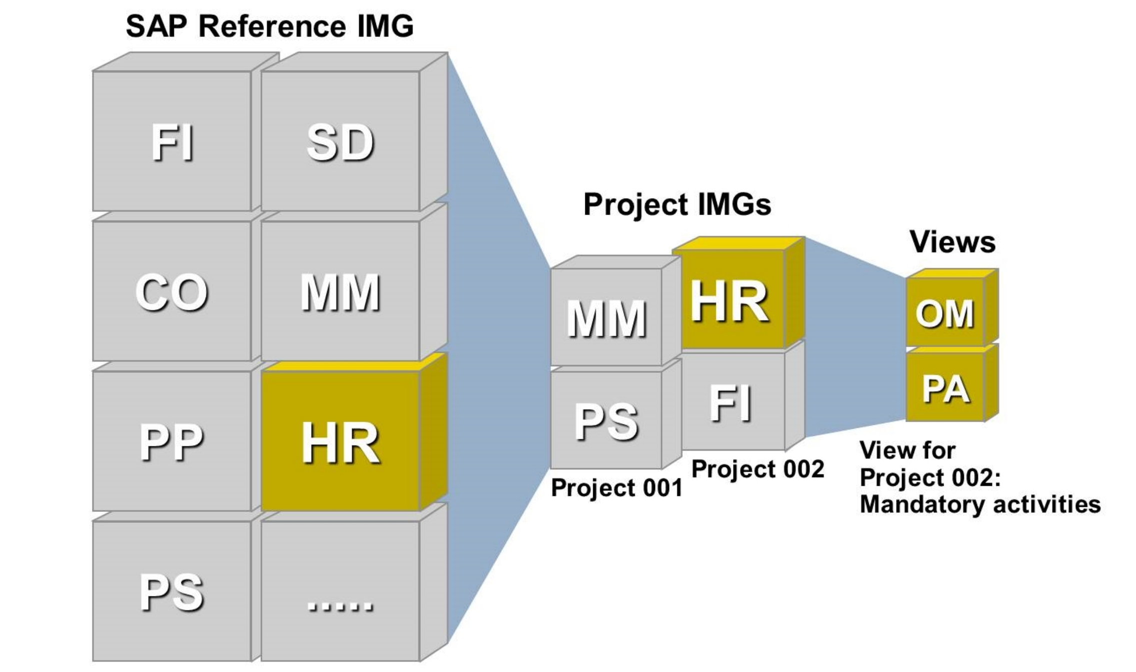

Figure 13: Structure of IMG

The steps required for implementing a system are part of the IMG.

Components of the IMG structure include the following:

- SAP Reference IMG
- Project IMGs
- Project view IMGs

SAP Reference IMG

In your delivery system, there is an SAP Reference IMG which contains all the customizing settings.

Project IMGs

In projects, you retain only those functions that you require. For each implementation project that you create with your required functions, you generate separate Project IMGs .

You create the Project IMG by selecting countries and application components based on the SAP Reference IMG. You can use the project IMG to process customizing steps, project documentation, and project information.

Project View IMGs

To make the project IMG even easier to use, you can create project views. You can also use project views to process Customizing steps, project documentation, and project information. You can use the attributes mandatory/optional/critical/non-critical as a basis for the views, or you can define your own views. By using views you can reduce the number of Customizing steps.

Managing and Executing Project IMG

You can either create a new project IMG or you can make changes to an existing project IMG. These can also be referred to as managing and executing projects.

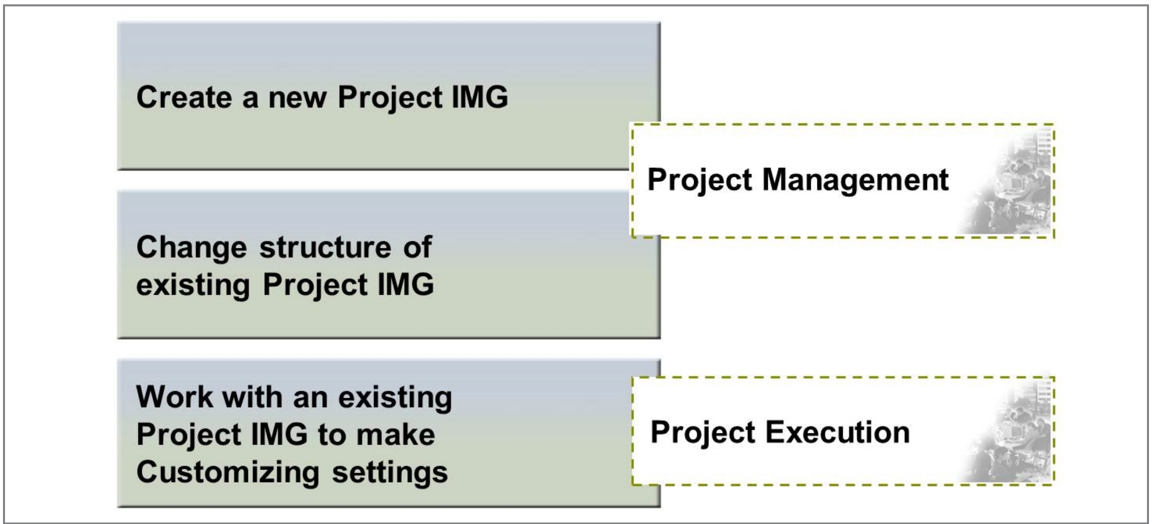

Figure 14: Difference Between Managing and Executing Projects

Project Management

As part of project management, you create new projects. You also change the structure of the existing Project IMGs such as the scope and planning data of projects.

Project Execution

You use project execution if you want to use an existing Project IMG or the SAP Reference IMG to make customizing settings.

LESSON SUMMARY

You should now be able to:

- Create a project IMG

Unit 3
Lesson 2

Executing Projects

LESSON OVERVIEW

This lesson shows you how to access the implementation guide (IMG).

Business Example

As an HR administrator, you are responsible for executing activities by setting up a project view for your project. This helps you structure your activities so that they are relevant to the project. For this reason, you require the following knowledge:

- An understanding of the functions that you can perform in IMG
- An understanding of activity attributes in IMG

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Customize limited views of IMG activities to facilitate project execution

IMG Functions

The IMG enables you to set up the system. You can use the IMG to make system settings for all applications in the SAP system.

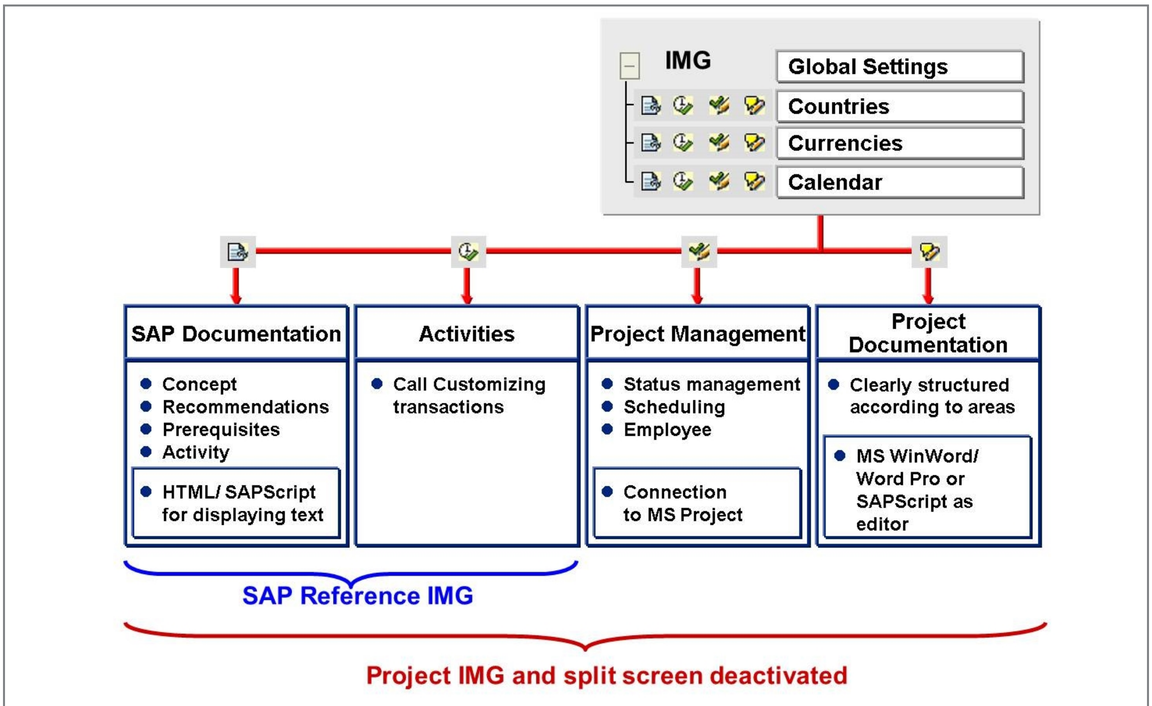

Figure 15: IMG: Functions

Application Areas of IMG

In SAP, the IMG is divided into application areas. The IMG lists activities in the required order of execution within these application areas.

The IMG also includes documentation for each activity. You can execute the activities directly from icons.

Project management and project documentation functions are also available in the project IMG.

SAP created the IMG using a hierarchical structure. On the lowest level, you can perform the following functions for an activity using icons:

Calling up SAP documentation:

You can find the information you need to help customize system settings.

Calling up the Customizing transaction:

You can use a selection of icons for system settings.

Calling up project management (only in project IMG):

You can call up project management for every customizing step. You can enter the status, tasks, degree of processing and resources.

Calling up project documentation (only in project IMG):

You can enter your project documentation for each Customizing step. You can store your documentation, either as project-specific or as project-independent documentation.

Evaluations in the IMG

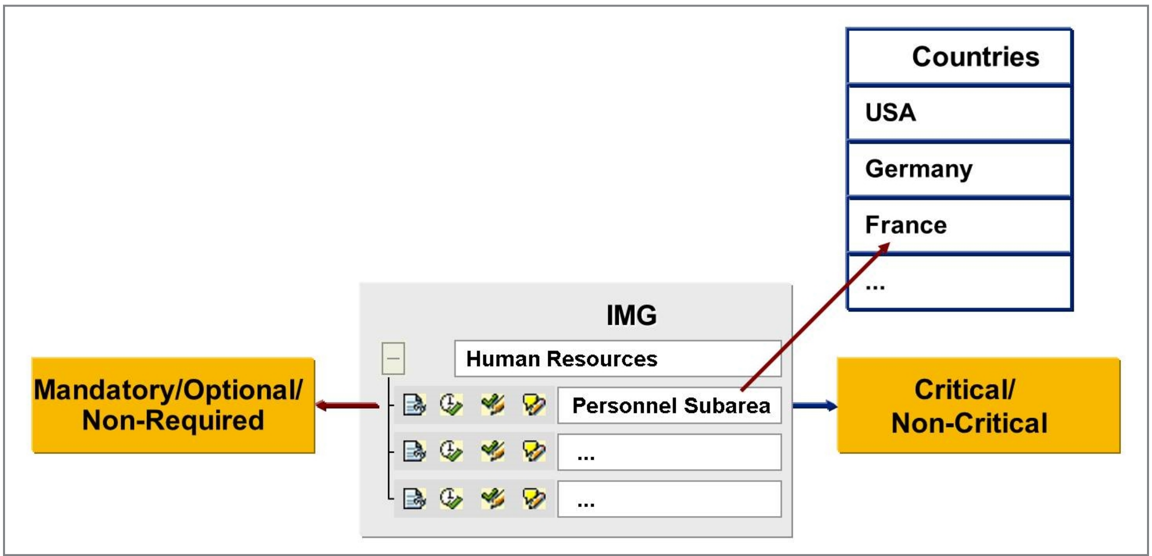

Figure 16: IMG: Attributes

In each project IMG, you can create specific views to reduce the number of Customizing activities. You can also use the IMG to edit individual Customizing activities.

IMG activities are classified according to a number of criteria. SAP provides specific attributes for each Customizing step.

Based on attributes, activities can be of the following types:

Mandatory activities:

SAP cannot deliver complete default settings for these activities. These activities must be executed before production starts (for example, developing the enterprise structure). You must store your customer-specific requirements for activities classified as mandatory.

Optional activities:

SAP delivers default settings for these activities. You can use these settings if they meet your requirements.

Non-Required activity:

SAP delivers complete default settings for these activities. Only in exceptional cases (such as country-specific settings), do you need to adapt these settings.

In addition, based on specific attributes, activities can be of the following types:

Critical activity:

You must proceed with great care when performing critical activities as any errors made here can have far-reaching consequences.

Non-Critical activity:

You must proceed with care when you carry out these activities, but the consequences of any errors are less far-reaching than in the case of a critical activity.

LESSON SUMMARY

You should now be able to:

- Customize limited views of IMG activities to facilitate project execution

Unit 3
Lesson 3

Maintaining Customizing Tables

LESSON OVERVIEW

This lesson shows you how to maintain table entries in the implementation guide.

Business Example

As a member of the HR project team, you are responsible for creating, deleting and delimiting entries in Customizing tables. For this reason, you require the following knowledge:

- An understanding of Customizing tables in the implementation guide
- An understanding of how to remove table entries in a Customizing table
- An understanding of how to set end dates on existing table entries

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Configure tables in the implementation guide to meet customization requirements
- Delete existing table entries in the implementation guide
- Set end dates on existing table entries

Customizing Tables in the IMG

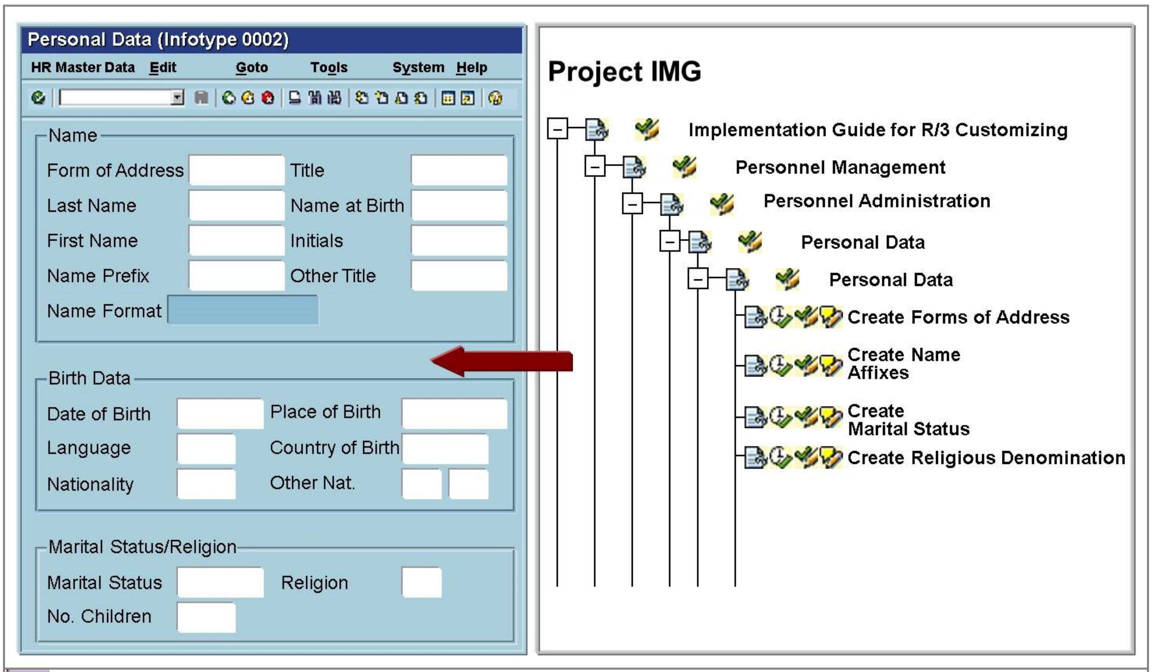

Figure 17: Links Between Master Data and Customizing Tables

You store employee data in infotypes. All entries that require specific texts come from tables that you can set up when you customize the system. The possible entries, which you can view by pressing F4, are a section of the IMG and enable you to see the data that the system stores in the corresponding table.

Customizing Tables: Key and Function Fields

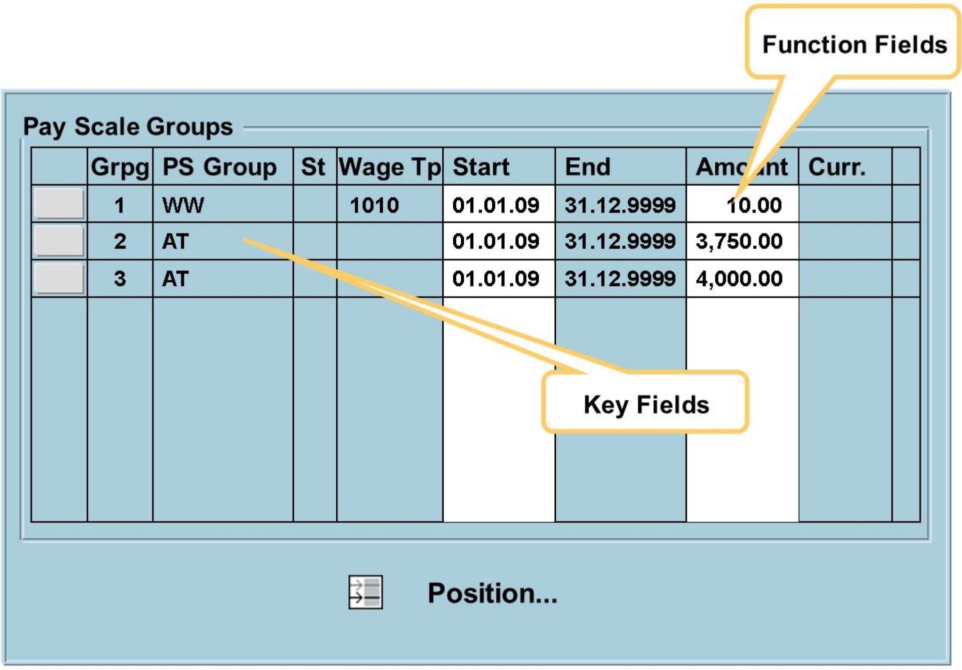

Figure 18: Customizing Tables: Key and Function Fields

As a personnel administrator, you need to create entries in Customizing tables to input employee master data and map the employees to the company data, such as enterprise structure, personnel structure and pay scale groups.

Every entry in a Customizing table has key and function fields . Key fields are grey and identify a unique entry, while function fields are white and describes an entry more precisely.

Note:
There can be only one table entry with the same key fields. This ensures that all table entries are unique.

Customizing Tables Create/Copy

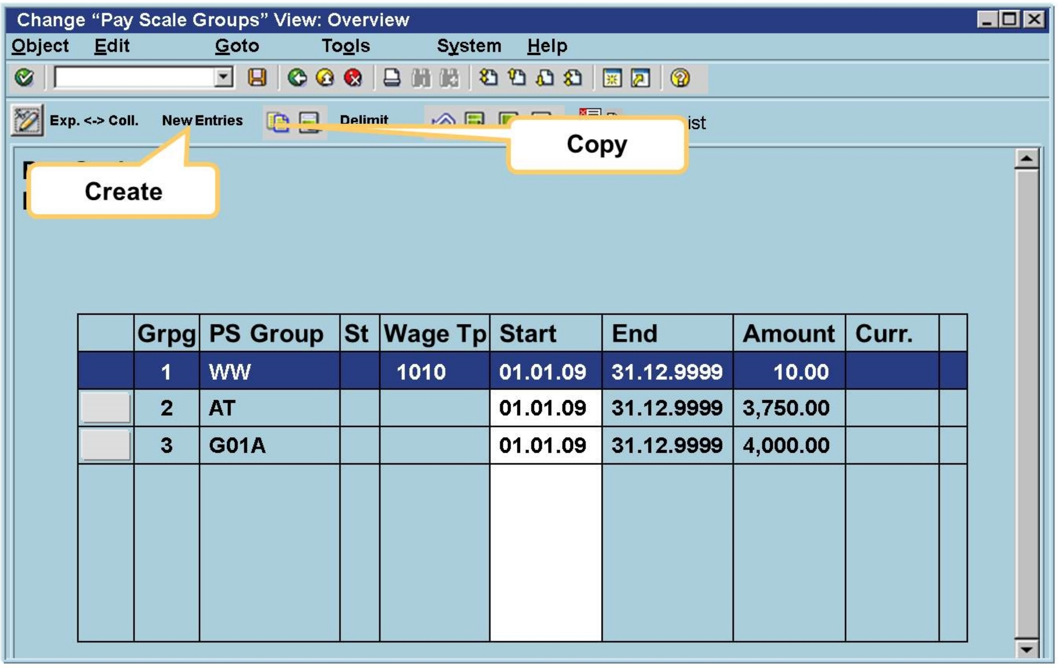

Figure 19: Customizing Tables: Create - Copy

You can use the following methods to create entries in Customizing tables:

New entries:

When you use the *New Entries* option, you receive an empty input template in which you can enter both the key and the function fields.

Copy entries:

To copy an existing entry, select the entry that you want to copy and overwrite the entries in the key field, and if necessary, the function fields on the subsequent screen.

Remove Table Entries

Within a Customizing table, you can delete entries that are incorrect.

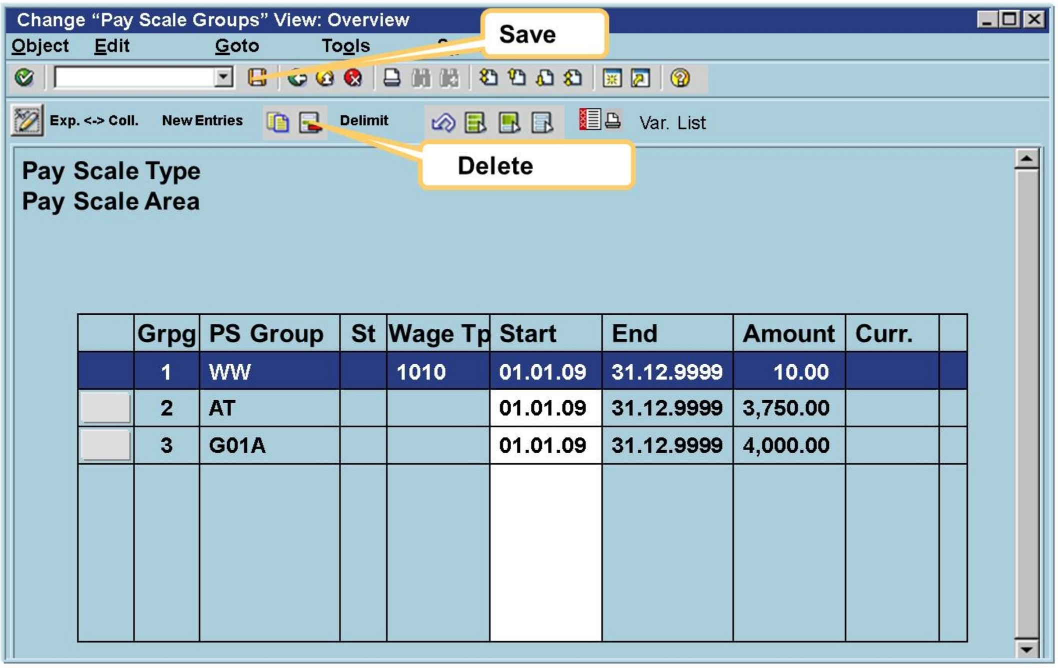

Figure 20: Customizing Tables: Delete

To delete entries from a Customizing table, select the entries that you want to delete and choose *Delete* .

Save all the changes that you make in a Customizing table.

Delimit Table Entries

You can also set end dates for table entries that are no longer valid after a certain date. This is called delimiting an entry. Delimiting invalidates an entry the day after the delimitation date.

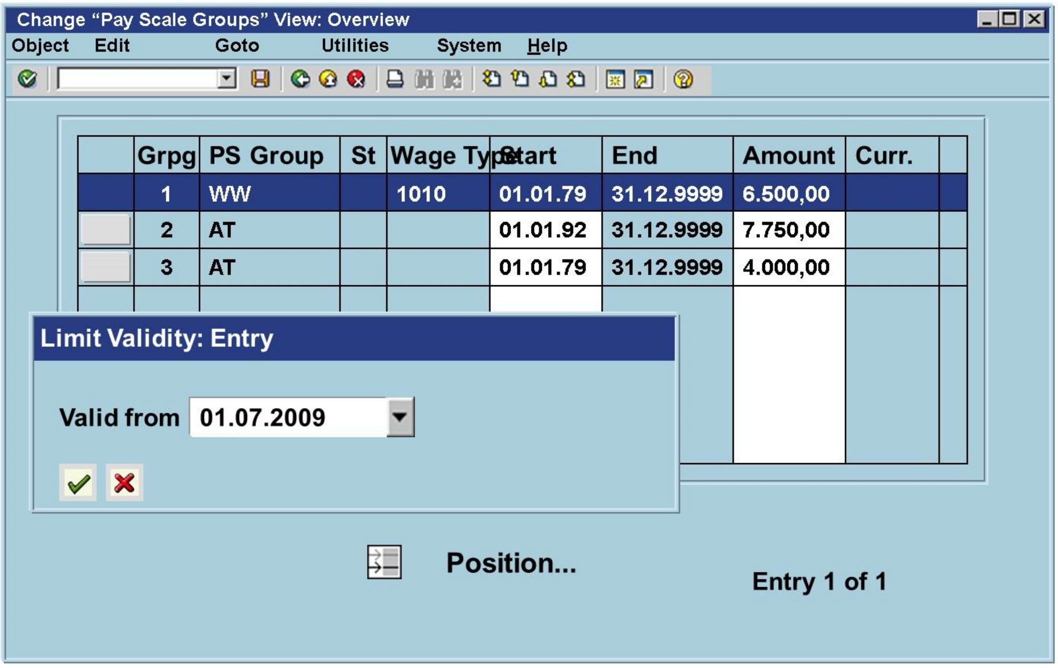

Figure 21: Customizing Tables: Delimit

To set an end date, choose the *Delimit* pushbutton and enter the delimitation date.

The system then automatically creates a new record, and you overwrite the function field. The old table entry is retained in system history.

> Note:
> In time-dependent tables, the system only displays records that are currently valid. You can use the Expand-Collapse function to display all the records.

LESSON SUMMARY

You should now be able to:

- Configure tables in the implementation guide to meet customization requirements
- Delete existing table entries in the implementation guide
- Set end dates on existing table entries

Learning Assessment

1. The IMG is a tool that helps customers adjust the SAP system to the requirements of a company.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. To make the project IMG easier to use, you can create:

   Choose the correct answer.

   - [ ] A Project tables
   - [ ] B Project views
   - [ ] C The SAP reference IMG

3. You can create new projects and also change the structure of the existing Project IMGs. This is done by:

   Choose the correct answer.

   - [ ] A Project views
   - [ ] B Project management
   - [ ] C The SAP reference IMG

4. Identify the activity for which SAP stores your customer-specific requirements and cannot deliver default settings.

   Choose the correct answer.

   - [ ] A Critical activity
   - [ ] B Optional activity
   - [ ] C Mandatory activity

5. Identify the function of the displayed pushbutton. 

   Choose the correct answer.

   - [ ] A Status documentation
   - [ ] B SAP documentation
   - [ ] C Status information

6. Identify the function which provides the details for every Customizing activity relevant to the project.

   Choose the correct answer.

   - [ ] A Project management
   - [ ] B SAP documentation
   - [ ] C Project documentation

7. An entry in a Customizing table is made up of the following fields:

   Choose the correct answers.

   - [ ] A Key
   - [ ] B Primary
   - [ ] C Function
   - [ ] D Reference

8. Function fields identify a unique entry.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

9. If an entry is no longer valid on a certain date, which of the following functions will you perform to set an end date for that entry?

   Choose the correct answer.

   - [ ] A Construct
   - [ ] B Delete
   - [ ] C Delimit
   - [ ] D Save

Learning Assessment - Answers

1. The IMG is a tool that helps customers adjust the SAP system to the requirements of a company.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

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   - [ ] B SAP documentation
   - [X] C Project documentation

7. An entry in a Customizing table is made up of the following fields:

   Choose the correct answers.

   - [X] A Key
   - [ ] B Primary
   - [X] C Function
   - [ ] D Reference

8. Function fields identify a unique entry.

   Determine whether this statement is true or false.

   - [ ] True
   - [X] False

9. If an entry is no longer valid on a certain date, which of the following functions will you perform to set an end date for that entry?

   Choose the correct answer.

   - [ ] A Construct
   - [ ] B Delete
   - [X] C Delimit
   - [ ] D Save

UNIT 4 Human Capital Management Structures

UNIT OBJECTIVES

- Outline HCM elements in the enterprise structure
- Define the use of clients in HCM
- Define the use of company codes in HCM
- Create personnel areas within the enterprise structure
- Create personnel subareas within the enterprise structure
- Identify the elements of the personnel structure
- Divide employees based on their relationship with the company
- Divide employees to facilitate payroll and time processing
- Verify organizational assignments

Unit 4
Lesson 1

Modifying the Enterprise Structure

LESSON OVERVIEW

This lesson outlines the elements of the enterprise structure.

Business Example

Your company has purchased a new manufacturing plant. As a personnel administrator working in the company, you need to map the new enterprise structure in the SAP system. For this reason, you require the following knowledge:

- An understanding of the enterprise and personnel structures
- An understanding of the personnel area and the personnel subarea

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Outline HCM elements in the enterprise structure
- Define the use of clients in HCM
- Define the use of company codes in HCM
- Create personnel areas within the enterprise structure
- Create personnel subareas within the enterprise structure

Company Structure

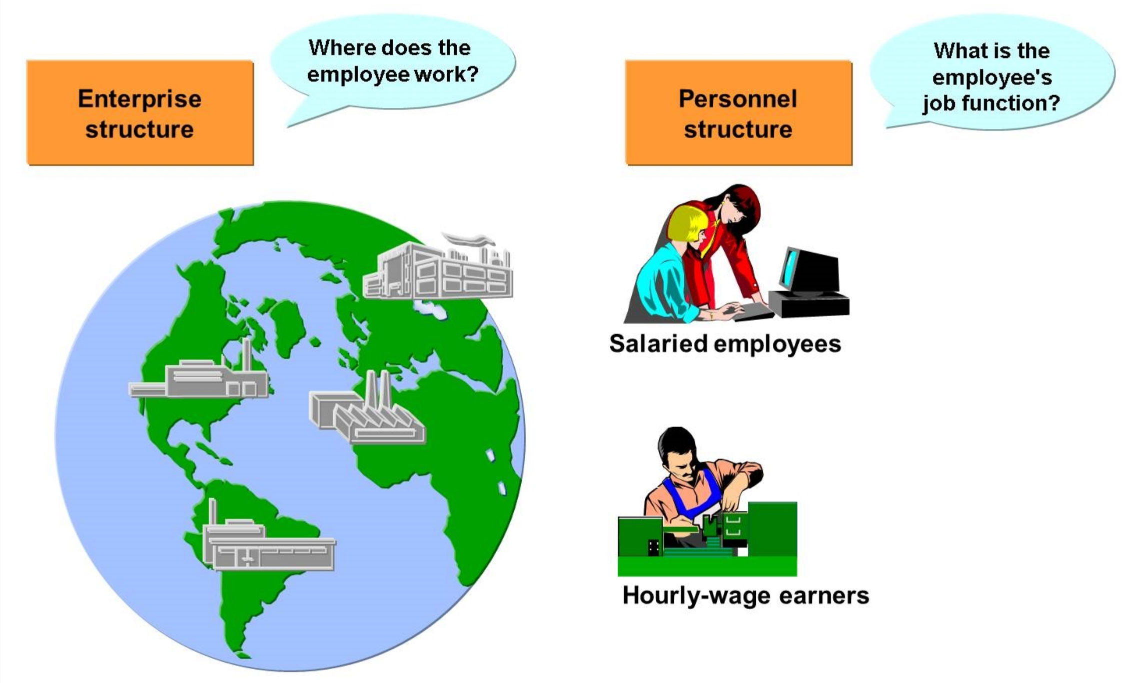


Figure 22: Overview - Enterprise Structure

In the SAP system, the company's structure consists of the enterprise structure and the personnel structure. The role of every employee is unique in the enterprise and personnel structures. You assign an employee to the enterprise structure in master data through the Organizational Assignment infotype (0001). You set up the enterprise and personnel structures using the Customizing functions.

Company Structure in the SAP System

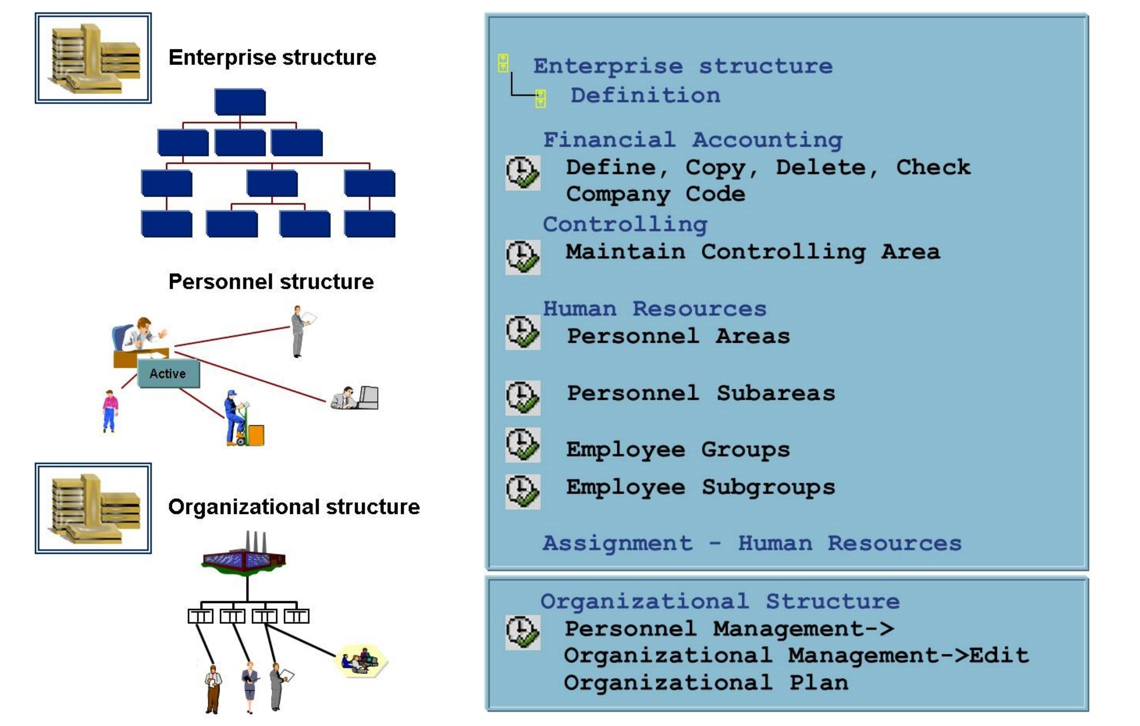


Figure 23: Company Structure in the SAP System

As the structure of your company has changed, you need to modify the existing structure in the system. You need to depict the purchase of the manufacturing plant in the enterprise structure.

In addition to these changes, the manufacturing plant has employees who do not exist in the company, for example, hourly-paid employees.

You must add the organizational units, jobs, and positions to the organizational structure.

An overview of the necessary Customizing steps appears on the right of the figure.

Enterprise Structure

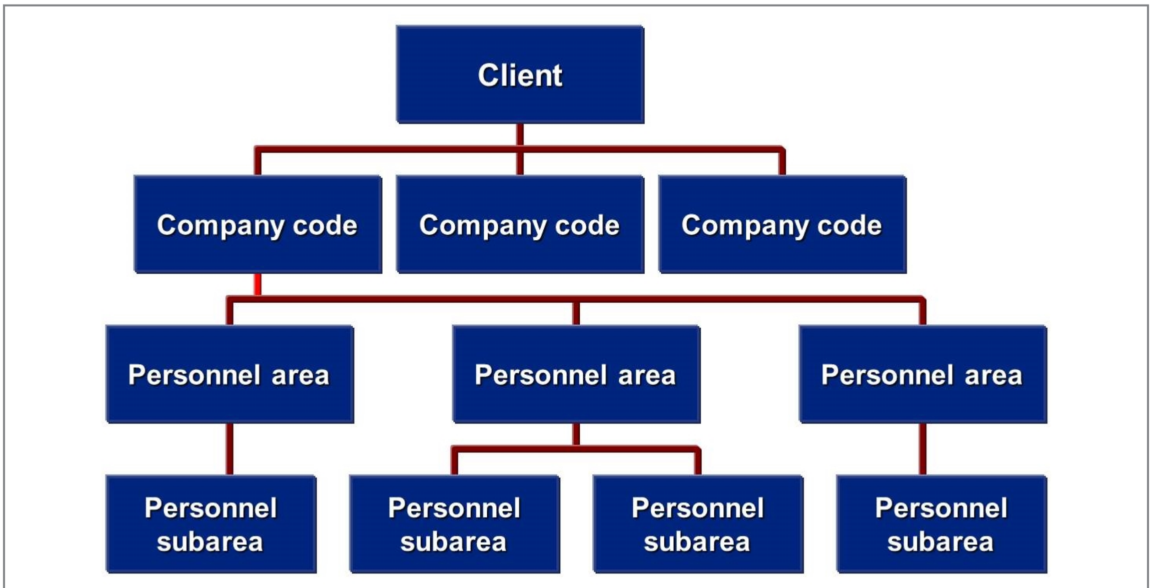


Figure 24: Enterprise Structure

The following elements define the SAP enterprise structure for personnel administration:

Client:

An element that is valid either for a company code at the smallest level or for the entire corporate group.

Company code:

An element of financial accounting. The balance sheet and profit and loss statements are drawn up at the company code level.

Personnel area:

An element used only in personnel administration. It is unique for each client. You must assign each personnel area to a company code.

Personnel subarea:

The smallest element of the enterprise structure. It is used only in personnel administration. You link the groupings that define the entries to be used for employees of a particular company code or personnel area to the personnel subarea.

Clients in the SAP System

The client is an independent legal and organizational unit of the system, for example a group. A three-character alphanumeric code uniquely identifies the different clients within a system.

Figure 25: Enterprise Structure – Client

The following rules apply to a client:

- No data exchange takes place among clients (exceptions applied).
- No access to employee data in other clients.
- No cross-client evaluations or access authorizations.
- An employee who moves from one client to another must be assigned a new personnel number.

Client 000 contains the original SAP system, and you cannot change it. Client 001 is also delivered to customers. Both systems are identical when they are delivered.

The system contains the following elements:

Client-independent elements:

Elements which are used in all clients. These elements consist of data structures such as field definitions, table and file structures, client-independent tables, transactions, programs, standard evaluations, authorization objects, help documentation and user-defined programs.

Client-specific elements:

Elements used only in certain special clients. These elements consist of client-specific tables (you must copy these from the original client), HR master records, user master records and authorization profiles.

Company Codes

The company code represents the highest level of the enterprise structure within a client. The company code is an independent company with its own accounting unit.

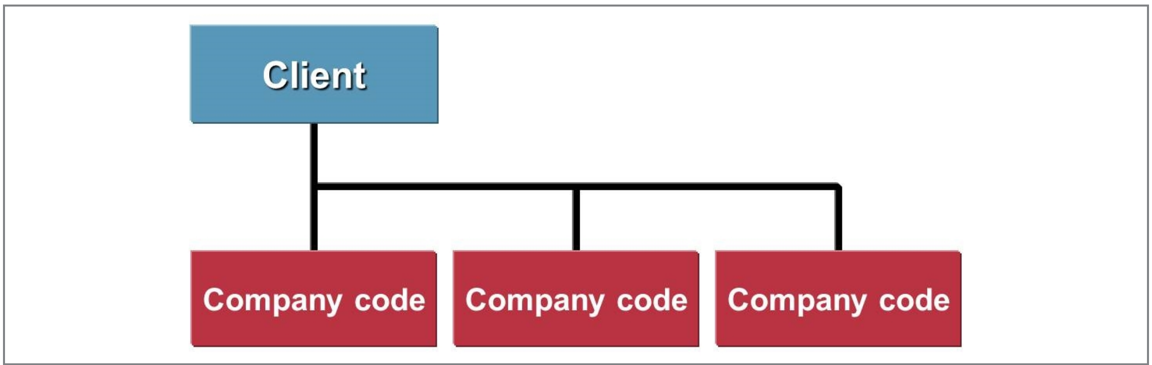


Figure 26: Enterprise Structure - Company Code

If you use the Controlling, Financial Accounting, Materials Management and, Sales and Distribution and Personnel Administration application components, as well as the personnel administration application component, you must coordinate the company code setup with the other application components. This does not impose any restrictions in the Human Resources areas, as you define the most important control information at the personnel subarea level.

The country grouping is defined at the personnel area level; but each country grouping must be unique within the company code. In other words, you must assign the same country grouping to all personnel areas within a company code. The country groupings control the master data entry and the setting up and processing of wage types and pay scale groups in payroll on a country-specific basis.

Personnel Area

A personnel area is a specific entity for personnel administration. It represents a subdivision of the company code.

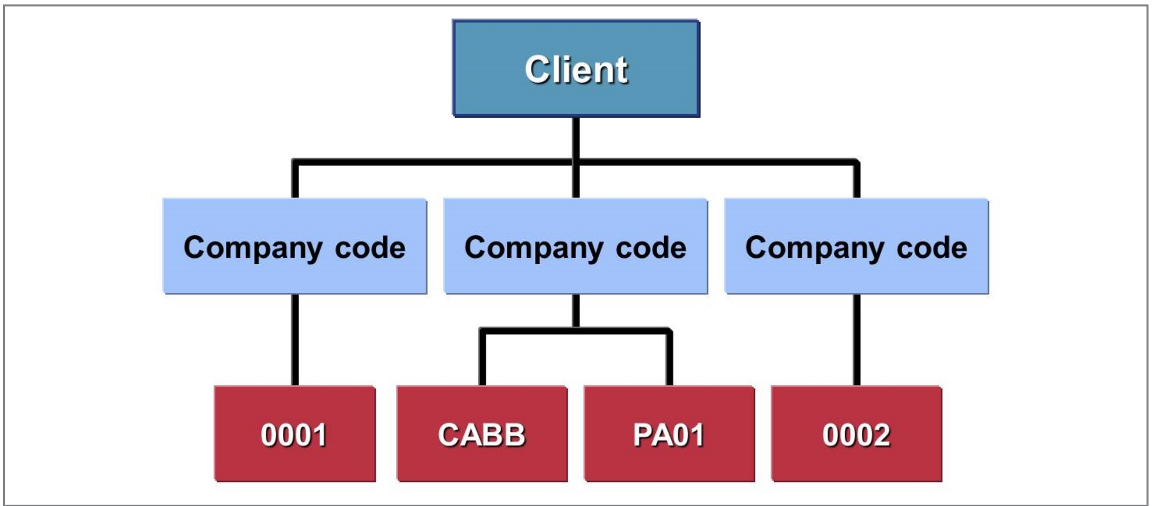


Figure 27: Enterprise Structure - Personnel Area

The personnel area has the following functions:

- It is a selection criterion for evaluations.
- It is an entity for authorization checks.
- It has to be uniquely assigned to company codes.
- It can be used to generate default values for data entry, for example, for the payroll area.

Personnel Subarea

Personnel areas are divided into personnel subareas. Important assignments for example, pay scale and wage type structures as well as work schedule planning are assigned at the level of the Personnel Subarea.

Four-character alphanumeric codes uniquely identify the personnel subarea.

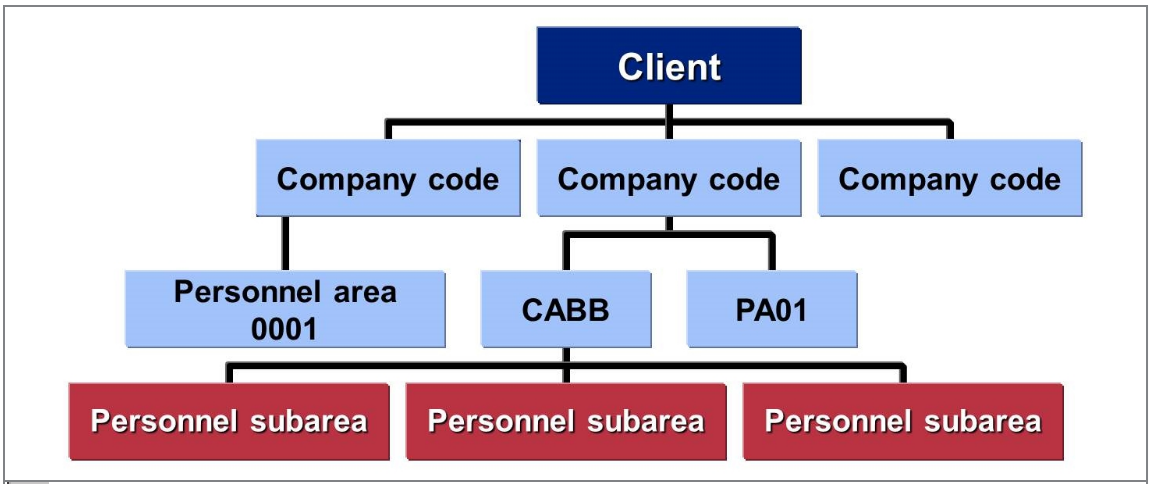


Figure 28: Enterprise Structure - Personnel Subarea

You define the regulations for employees at the personnel area and personnel subarea levels. These may be legal, contractual or company-specific regulations.

You assign a company code to a personnel area. You must add to the company code any financial accounting data relevant to the personnel area.

For each personnel subarea, you must define the following:

- One pay scale area
- One pay scale type
- One holiday calendar

Indicators Defined Using the Personnel Subarea

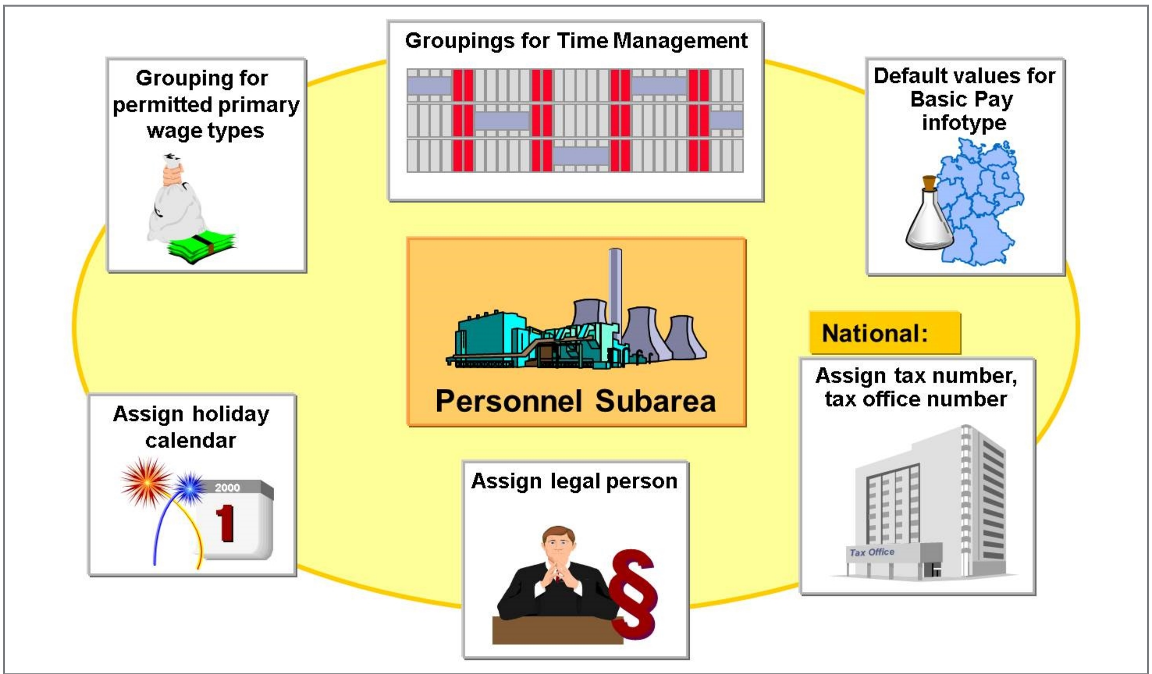


Figure 29: Indicators Defined Using the Personnel Subarea

The following indicators are defined by the personnel subarea:

International (T001P) that includes the following:

- Default values for the pay scale area and pay scale type
- Assignment of a personnel subarea to a public holiday calendar, legal person and statistics group
- Grouping of personnel subareas for vacation, work schedule, attendance and absence types, substitution and availability types, attendance and absence counting, time recording, time quotas and premiums
- Personnel subarea grouping for permissibility of primary wage types
- Grouping of personnel subareas for appraisals

National (for example, for Germany in T5D0P) that includes the following:

- Assignment of tax-relevant corporate features (church tax area, tax office number, tax number)

- Flat-rate church tax
- DUEVO check
- Miners' and mine-employees' insurance company numbers

Enterprise Structure for CAB Company

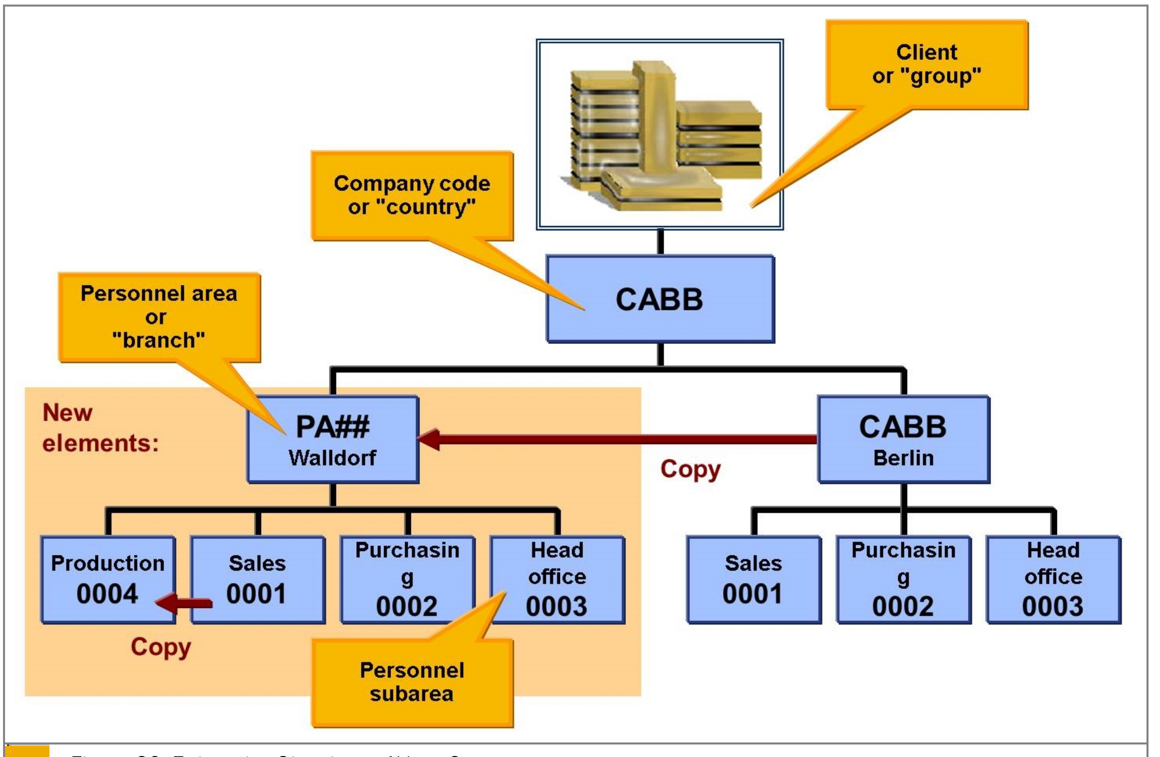


Figure 30: Enterprise Structure of Your Company

You must depict the structure of your company in the SAP system. The figure Enterprise Structure of Your Company shows the enterprise structure of your company, which is an example of how todepict an enterprise structure in the SAP system.

To create a new personnel (sub)area, SAP recommends that you copy an existing personnel (sub)area using the entity copier.

Enterprise Structure Copy Function

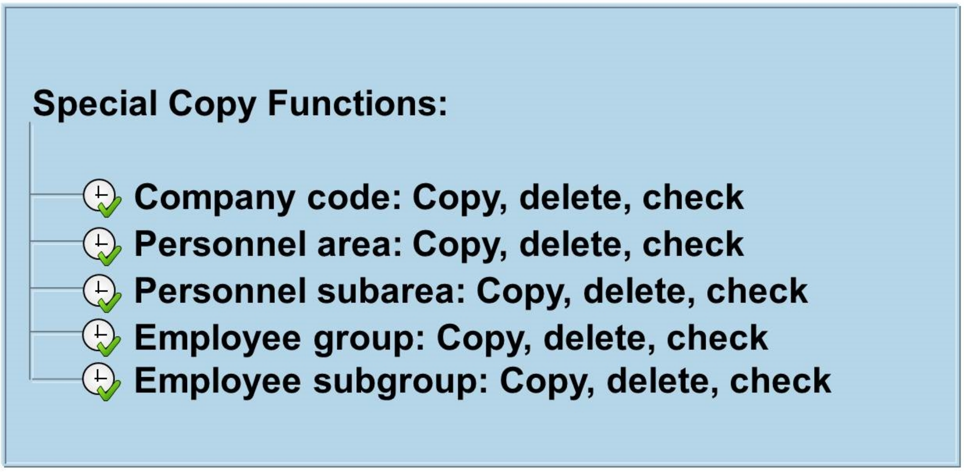


Figure 31: Enterprise Structure: Copy Function (1)

You can use the copy function to create new elements of the enterprise structure quickly and easily, so that you do not have to call up the subsequent tables individually.

You can use the copy function for company codes, personnel areas, personnel subareas, and employee subgroups.

Following actions can be performed:

- Copy
- Delete
- Check
- Create and edit project IMG views

Enterprise Structure: Copy Function (2)

If you have already carried out the system settings for the unit that you have just created, you can still use the copy function. In this case, the system duplicates only the missing entries. Existing entries remain unchanged. The result of this copy action is a project IMG view that contains all the objects changed by the copy action.

A number of control indicators are connected to elements of the company structure. You can then access them on subsequent screens.

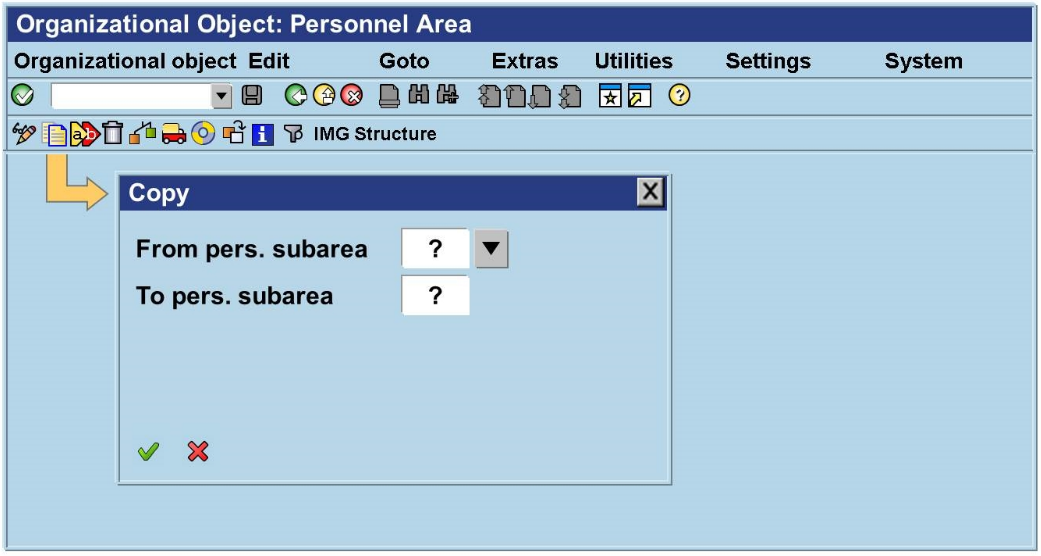


Figure 32: Enterprise Structure: Copy Function (2)

LESSON SUMMARY

You should now be able to:

- Outline HCM elements in the enterprise structure
- Define the use of clients in HCM
- Define the use of company codes in HCM
- Create personnel areas within the enterprise structure
- Create personnel subareas within the enterprise structure

Unit 4
Lesson 2

Enhancing the Personnel Structure

LESSON OVERVIEW
This lesson explains the meaning and elements of the personnel structure.

Business Example:

Your company has purchased a new manufacturing plant. You must now map the new personnel structure in the SAP system. For this reason, you require the following knowledge:

- An understanding of the personnel structure

LESSON OBJECTIVES
After completing this lesson, you will be able to:

- Identify the elements of the personnel structure
- Divide employees based on their relationship with the company
- Divide employees to facilitate payroll and time processing
- Verify organizational assignments

Personnel Structure

The personnel structure displays the position of individual people in the enterprise as a whole.

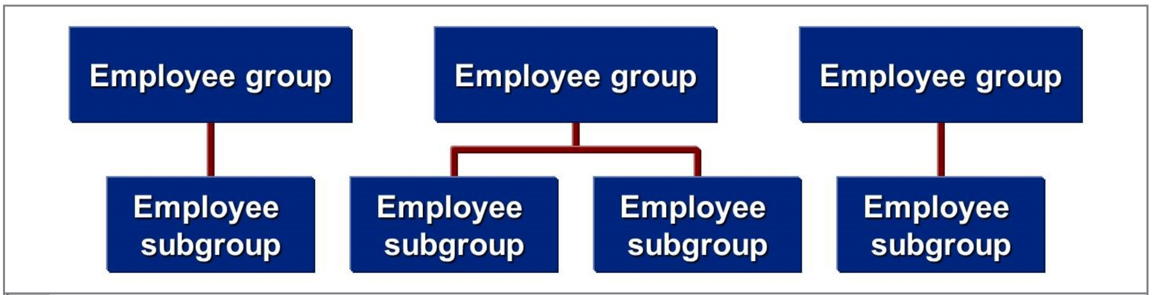


Figure 33: Overview of Personnel Structure

Personnel structure provides the following information related to an employee:

- The relationship between the employee and the Company
- Employee's job function

Every employee has an organizational assignment that is unique in the enterprise structure and personnel structure.

Employee Group

The employee group is a component of personnel structure.

Figure 34: Personnel Structure: Employee Group

The employee group is a general division of employees.

Following are some of the categories of the employee groups:

- *External*
- *Active*
- *Retiree*

The employee group defines the relationship between an employee and a company where the employee makes a certain contribution to the company in terms of work.

Organizational Functions in the Employee Group

The employee group has the following important organizational functions:

- You can use an employee group to generate default values for data entry, for example, for the payroll accounting area or an employee's basic pay.
- You can use an employee group as a selection criterion for reporting.
- You can use an employee group as an entity for authorization checks.

To set up employee groups, you use the standard catalog. However, employee groups can also be created to meet individual customer requirements.

Employee Subgroups

An employee group consists of a number of employee subgroups.

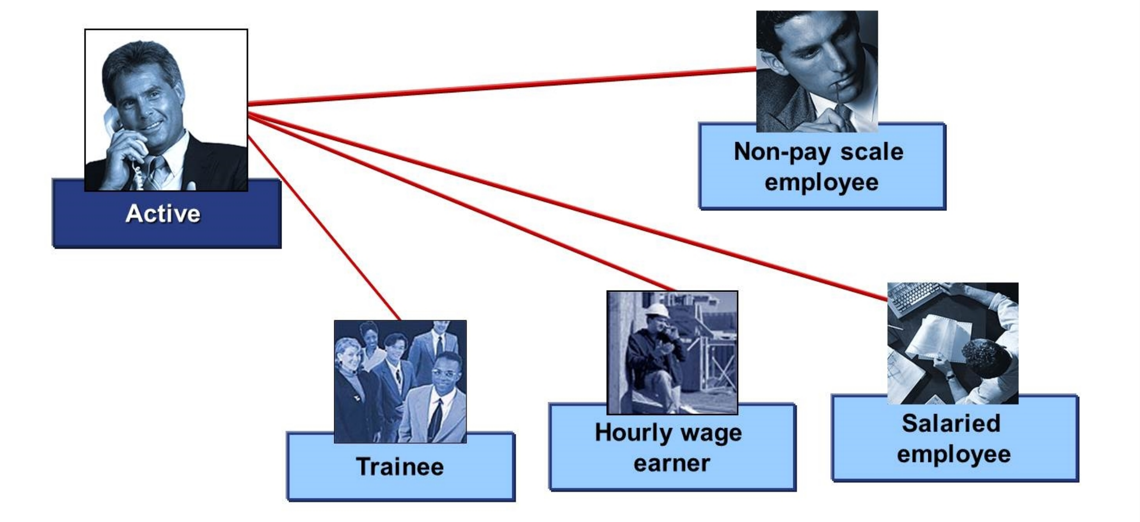


Figure 35: Personnel Structure: Employee Subgroup

For example, active employees can be split up into categories according to their status. Therefore, active employee group can be categorized into the following employee subgroups:

- *Trainees*
- *Hourly or monthly wage earners*
- *Salaried* employees
- *Pay scale* and *Non-pay scale* employees

You define an employee subgroup in Customizing and assign a two-character alphanumeric identifier to it.

Employee Subgroup Groupings

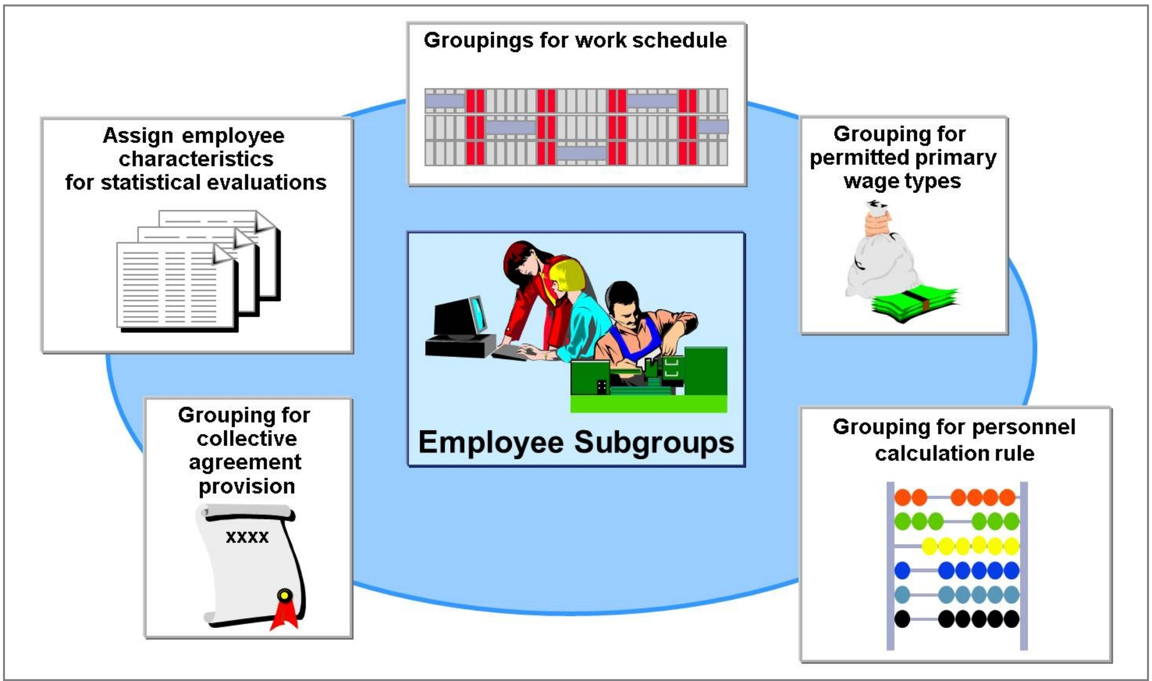


Figure 36: Indicators Defined by Employee Subgroups

You can use the employee subgroup to set the following indicators:

International Indicators

- The employee subgroup grouping for the **work schedule** allows you to define which work schedules are valid for which employee subgroups.
- The employee subgroup grouping for **primary wage types** controls the validity of wage types at employee subgroup level.
- The employee subgroup grouping for the **personnel calculation rule** controls how the system processes an employee's payroll, for example, whether an employee is to be paid on an hourly or pay period amount.
- The grouping for **collective agreement provision** restricts the validity of pay-scale groups to specific employee subgroups.
- You can also assign employee characteristics such as the activity status, employment status, and level of education or training, for statistical purposes.

Following are additional indicators that can be set using the employee subgroup:

- The employee subgroup grouping for **time quotas** allows you to specify the valid attendance and absence quota types for particular employee subgroups.
- The employee subgroup grouping for **appraisals** allows you to define appraisal criteria for each employee subgroup.
- The employee subgroup allows you to define default values for **data entry** , for example, for the payroll area or basic pay.

National Indicator (For Example, Germany)

- There are country-specific indicators also, for example Germany. These indicators allow you to define default values for social insurance.

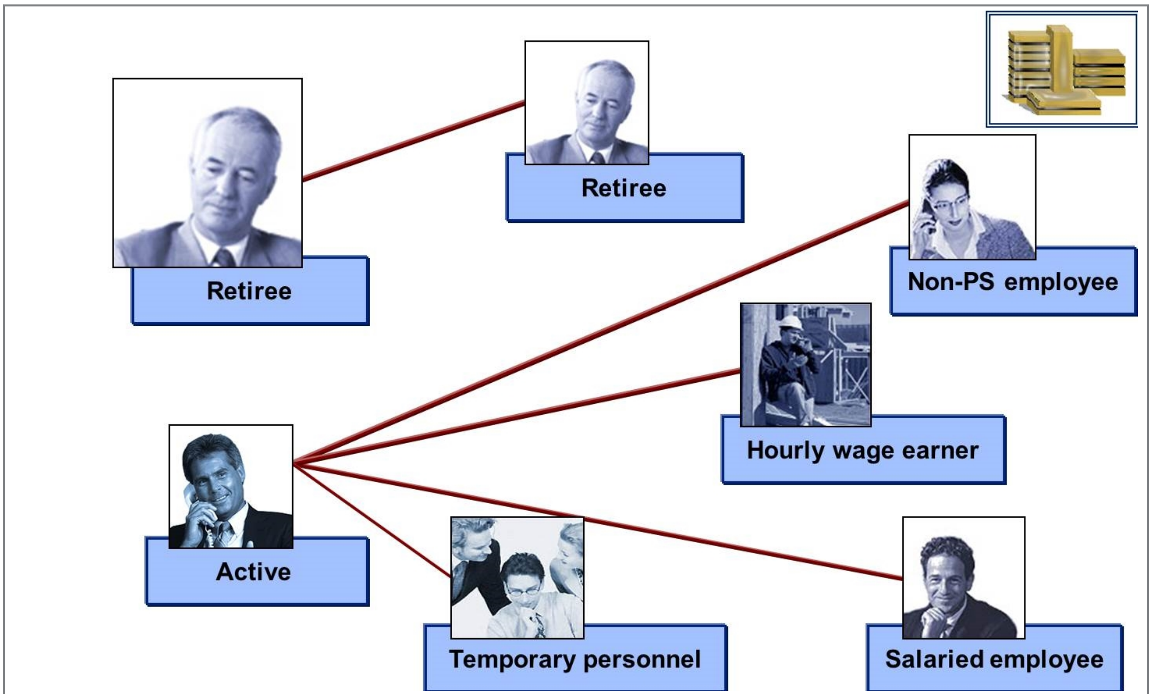


Figure 37: Relationship Between Employee Groups and Employee Subgroups

Organizational Assignments

Organizational assignments define the relationship between organizational entities such as personal area and company code and employee groups and employee subgroups.

Personnel Area - Company Code

Pers.Area	Personnel Area Text	Company Code	Company Name	Country Grpg
AT01	Personnel Area AT01	AT01	Country Template AT	03
AV01	Australian Personnel	AV01	Country Template AV	13
BE01	Personnel Area BE01	BE01	Country Template BE	12
CA01	Personnel Area CA01	CA01	Country Template CA	07

Employee Group - Employee Subgroup

EEGrp	EE Group Text	EESgrp	EE Subgroup Text
1	**Active**	**X0**	**Salaried EE**
1	**Active**	**X1**	**Hourly Wage Earners**

EE Group **1** Active

EE Subgroup **DA** Trainee Ind.

Ctry	Name	Allowed
	Germany	☒
	Switzerland	☐
	Austria	☐

Figure 38: Organizational Assignments

In addition, you assign the country grouping to a personnel area in this table. When you create a personnel number for an employee, the system assigns a relevant company code in the *Organizational Assignment* infotype (0001). This company code depends on the enterprise structure to which you have assigned the employee. In addition to a personnel number, you assign a personnel area for which the employee works. Make sure that you assign all personnel areas in one company code to the same country grouping. The country grouping includes the country code in which the personnel area exists (the same country in which the company code exists).

> Note:
> Country groupings serve to differentiate between countries according to human resources criteria; these groupings also acts as a key field in tables that allow you to create data, such as wage types and pay scale tables, for specific countries.

Within the organizational assignment, you also assign your employee subgroups to the relevant employee groups. You can also define permissible employee group or employee subgroup combinations for your country groupings.

For example, you should assign the employee subgroup *Trainee* to the employee group *Active* and not to the employee group *Retiree* .

LESSON SUMMARY

You should now be able to:

- Identify the elements of the personnel structure
- Divide employees based on their relationship with the company
- Divide employees to facilitate payroll and time processing
- Verify organizational assignments

Unit 4

Learning Assessment

1. The personnel area represents the highest level of the enterprise structure within a client.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. Which of the following define an element of the enterprise structure for personnel administration?

   Choose the correct answers.

   - [ ] A Organizational structure
   - [ ] B Employee groups
   - [ ] C Client
   - [ ] D Personnel subarea

3. Which of the following is a client independent element?

   Choose the correct answer.

   - [ ] A User master records
   - [ ] B HR master records
   - [ ] C Authorization objects
   - [ ] D Authorization profiles

4. Personnel subarea is used as the basis for which of the following?

   Choose the correct answers.

   - [ ] A Grouping work schedule
   - [ ] B Grouping attendance and absence types
   - [ ] C Substitution and availability types
   - [ ] D Grouping personnel area

5. Personnel structure displays the type of relationship of individual people in the enterprise.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

6. Which of the following could be a part of active employees group?

   Choose the correct answers.

   - [ ] A Trainees
   - [ ] B Retired Employees
   - [ ] C Hourly or monthly wage earners
   - [ ] D Pay scale and Non-pay scale employees

7. Identify the employee subgroup grouping that controls the validity of wage types at employee subgroup level.

   Choose the correct answer.

   - [ ] A Work schedule
   - [ ] B Employee Subgroup Grouping for Primary Wage Type
   - [ ] C Personnel calculation rule

Learning Assessment - Answers

1. The personnel area represents the highest level of the enterprise structure within a client.

   Determine whether this statement is true or false.

   [ ] True

   [X] False

2. Which of the following define an element of the enterprise structure for personnel administration?

   Choose the correct answers.

   [ ] A Organizational structure

   [ ] B Employee groups

   [X] C Client

   [X] D Personnel subarea

3. Which of the following is a client independent element?

   Choose the correct answer.

   [ ] A User master records

   [ ] B HR master records

   [X] C Authorization objects

   [ ] D Authorization profiles

4. Personnel subarea is used as the basis for which of the following?

   Choose the correct answers.

   - [x] A Grouping work schedule
   - [x] B Grouping attendance and absence types
   - [x] C Substitution and availability types
   - [ ] D Grouping personnel area

5. Personnel structure displays the type of relationship of individual people in the enterprise.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

6. Which of the following could be a part of active employees group?

   Choose the correct answers.

   - [x] A Trainees
   - [ ] B Retired Employees
   - [x] C Hourly or monthly wage earners
   - [x] D Pay scale and Non-pay scale employees

7. Identify the employee subgroup grouping that controls the validity of wage types at employee subgroup level.

   Choose the correct answer.

   - [ ] A Work schedule
   - [x] B Employee Subgroup Grouping for Primary Wage Type
   - [ ] C Personnel calculation rule

UNIT 5 Organizational Structure

UNIT OBJECTIVES

- Identify the objects used to map an organizational structure
- Activate integration between Organizational Management and Personnel Administration
- Set up objects to facilitate data integration between organization and staffing and personnel administration
- Control organizational management values to default to personnel administration values

Unit 5
Lesson 1

Mapping the Organizational Structure

LESSON OVERVIEW

This lesson identifies the objects used to map an organizational structure.

Business Example:

Your company has recently bought a production plant. As a result, changes need to be made in the organizational structure. In addition, there are a large number of new employees that you need to include in your company's organizational plan. For this reason, you require the following knowledge:

- An understanding of the organizational plan in the SAP system
- An understanding of the organizational structure in the SAP system

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Identify the objects used to map an organizational structure

Organizational Plan

An organizational plan depicts the organizational structure and is used to represent the relationships between individual departments and work groups.

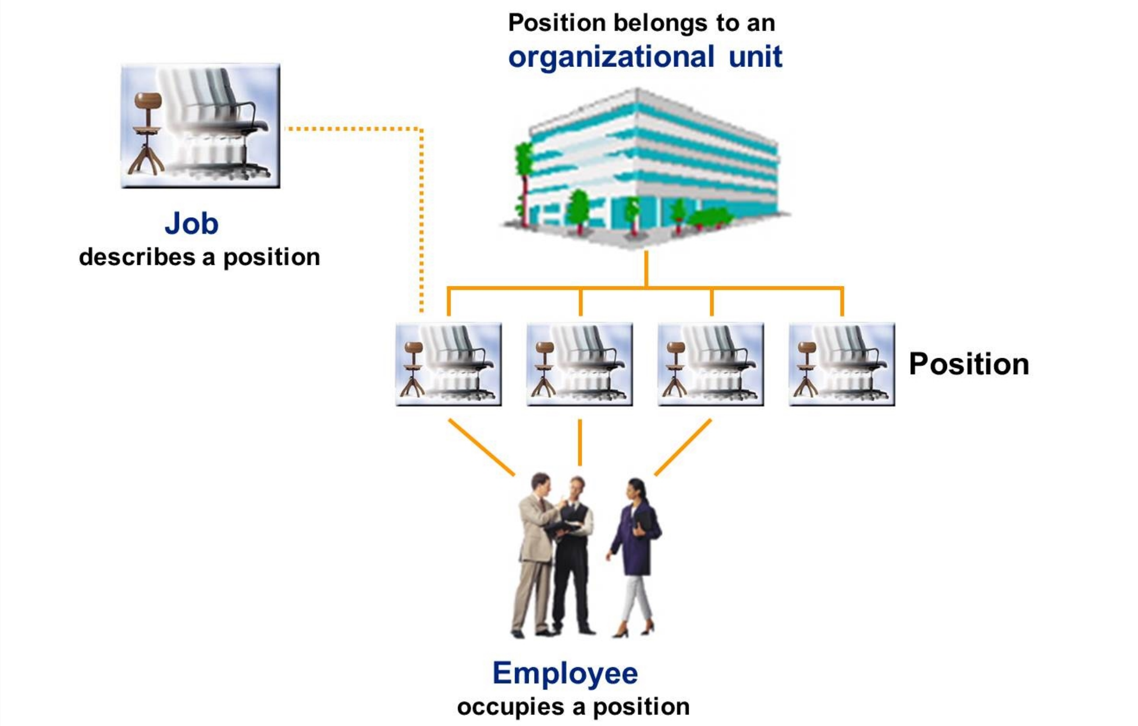


Figure 39: Organizational Plan

The organizational plan depicts the organizational structure. A company uses an organizational plan to represent the relationships between individual departments and work groups. The SAP system uses organizational units for this. For example, the Purchasing department or organizational unit has 12 positions and employs one secretary, one manager, and 10 purchasers.

Persons (employees) are a fundamental part of the organizational structure and carry out various activities.

Organizational Management

Organizational units describe the different departments in the enterprise. Many organizational units together form an organizational structure .

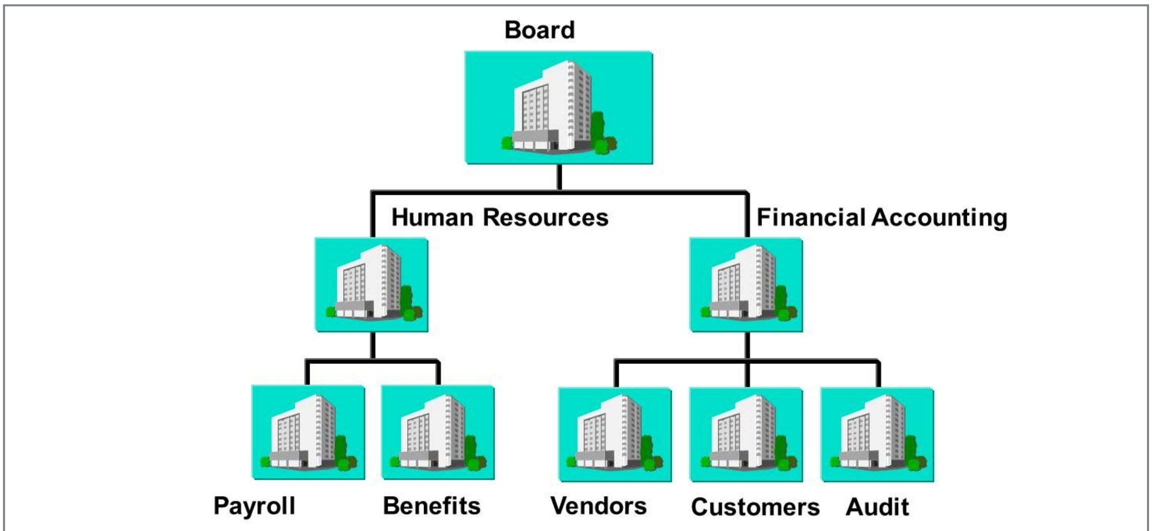


Figure 40: Organizational Units

Depending on the enterprise-specific requirements, you can divide organizational units generally (for example, according to regional aspects) or more precisely (for example, according to project group).

Job

Figure 41: Jobs

A job is the general classification for a set of tasks in an enterprise such as salesperson, consultant, and manager. You can assign characteristics to define the jobs further. In this way, you can create valid job descriptions for several positions with similar tasks and characteristics.

Positions

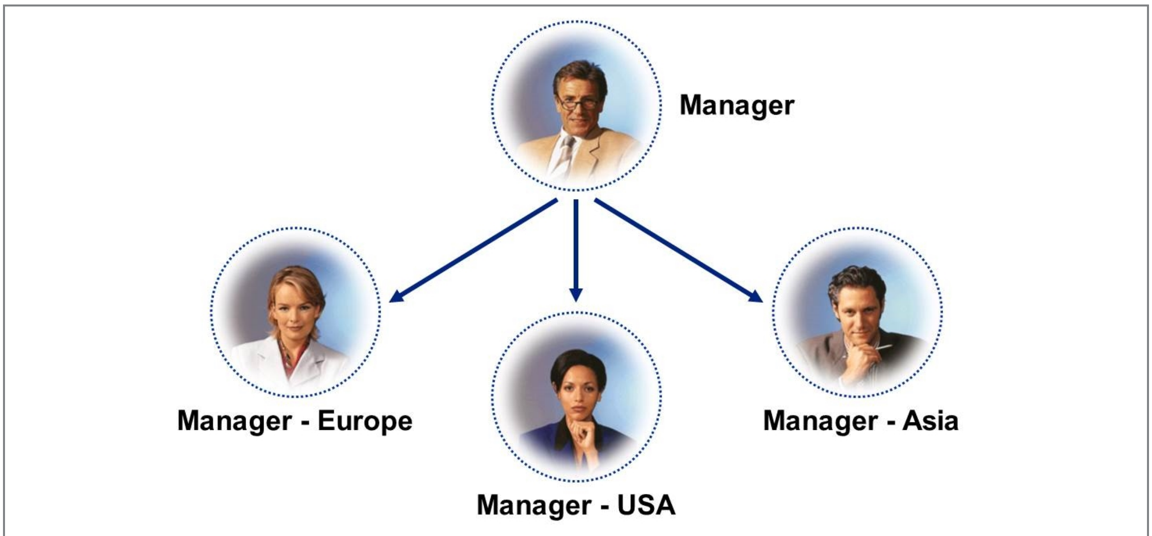


Figure 42: Positions

Positions represent a specific job entity and are occupied by persons. When you create a new position such as European Manager, you can link it to an existing job such as Administrator. This ensures that the new position automatically inherits the tasks and characteristics assigned to the job.

You assign the employees in your company to positions. This ensures that the employees are included in the organizational structure. By using additional data created in the system, you can also map the reporting structure of your company.

Example: You have employees who you assigned to a position in the Organizational Assignment infotype (0001). The pay for this position is made in EUROs. The employee is to

be remunerated with the value for this position (ARBPL module is pay based on position. For more information on this, refer to the the Wage Type Structure unit).

Organizational Structure at Enterprise Level

Figure 43: Organizational Structure at the Enterprise Level

The figure Organizational Structure at the Enterprise Level shows how you can map an enterprise's organizational structure in the SAP system and define the different departments and subdivisions as organizational units. This often reflects an enterprise's cost center hierarchy.

Organizational Structure at Position Level

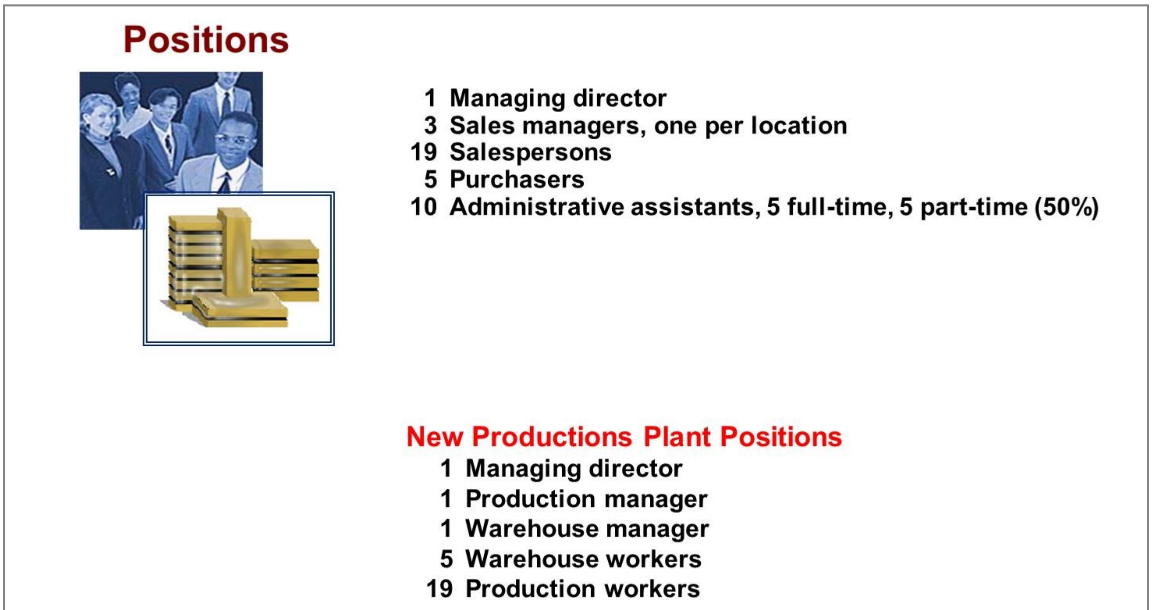


Figure 44: Organizational Structure at the Position Leve

The figure Organizational Structure at the Position Level shows how to depict an organizational structure in the SAP system where employees occupy individual positions.

LESSON SUMMARY

You should now be able to:

- Identify the objects used to map an organizational structure

Unit 5
Lesson 2

Integrating with Organizational Management

LESSON OVERVIEW

This lesson shows you how to activate the integration between Organizational Management and Personnel Administration. In addition, it shows you how to set up the objects in the *Organization and Staffing* interface to facilitate data integration with Personnel Administration.

Business Example

New employees have joined your organization. You need to ensure that the new employees, who are hired, are automatically included in the enterprise's organizational structure. For this reason, you require the following knowledge:

- An understanding of how to activate the integration between Organizational Management and Personnel Administration
- An understanding of how to set up the objects in the *Organization and Staffing* interface to facilitate data integration with Personnel Administration

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Activate integration between Organizational Management and Personnel Administration
- Set up objects to facilitate data integration between organization and staffing and personnel administration

Integration Between Organizational Management and Personnel Administration

If you integrate Organizational Management and Personnel Administration, you can enter a position in the *Actions* infotype (0000).

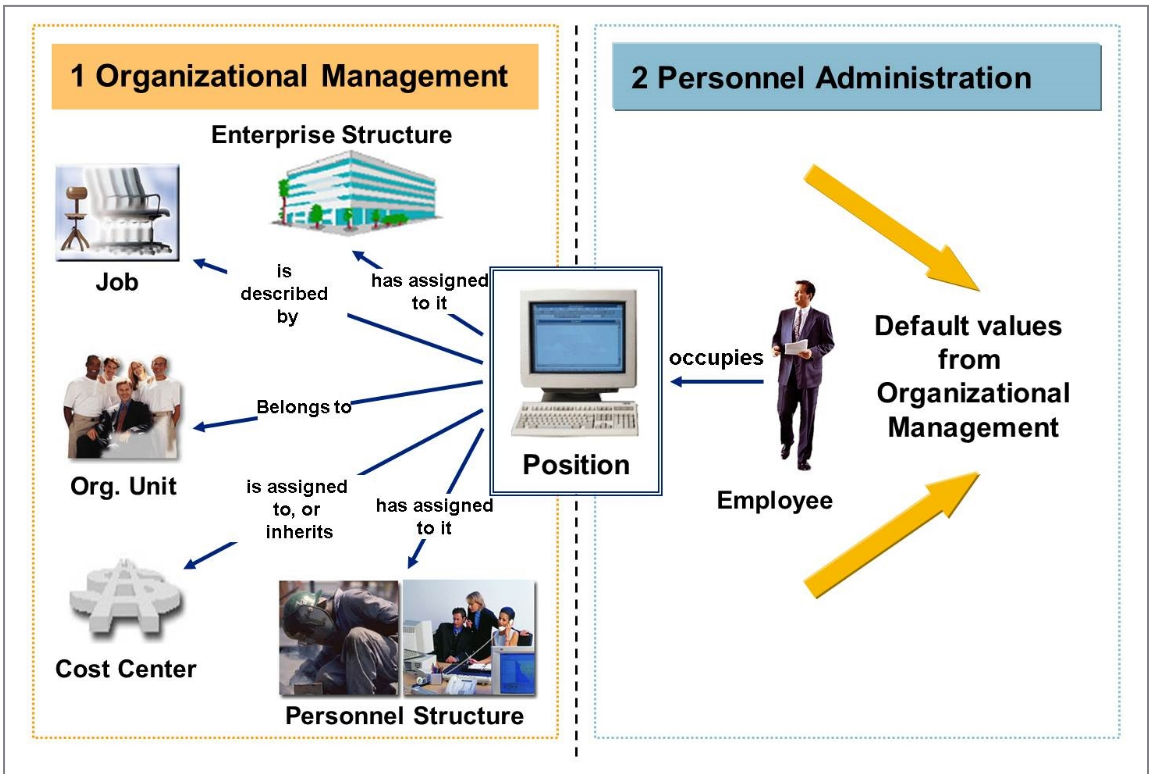


Figure 45: Integration Between Organizational Management and Personnel Administration

When you enter the position, the system proposes the values stored in Organizational Management as default values for the following:

- Employee group
- Employee subgroup
- Personnel area
- Personnel subarea

The system also includes the values for job, organizational unit, and cost center, but you cannot overwrite these entries in the *Organizational Assignment* infotype.

Integration Activation

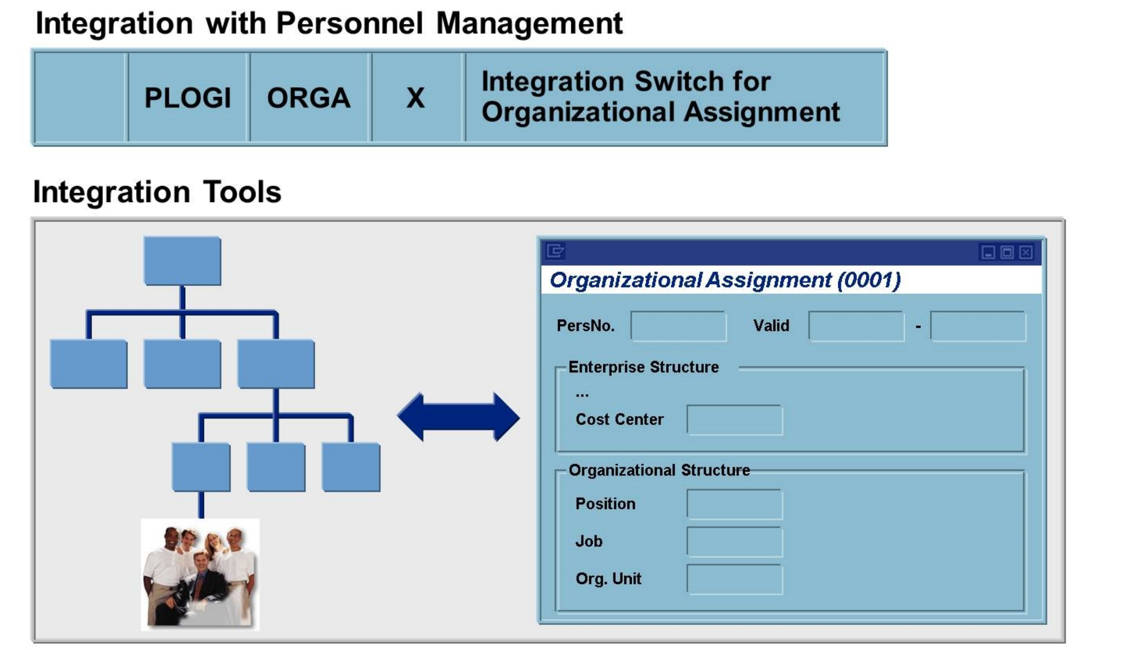


Figure 46: Setting Up Integration Between Organizational Management and Personnel Administration

The system stores the relationship between Organizational Management and Personnel Administration in Customizing: *Personnel Management* → *Organizational Management* → *Integration* → *Integration with Personnel Administration* → *Set up Integration with Personnel Administration* → *Execute* and in the *Choose activity* dialog box, choose: *Basic Settings* . Use the *PLOGI ORGA* switch to determine whether or not integration with the *Organizational Assignment* infotype (0001) takes place.

You can use the *PLOGI* feature in conjunction with the organizational assignment, such as employee subgroup and personnel area, to specify which groups of employees can participate in integration.

Depending on the system you use in the enterprise, you can use the following ways to activate integration:

- If you have implemented Personnel Administration and need to re-customize Organizational Management, the system converts the entries in the relevant Personnel Administration tables for the personnel planning objects.
- If you have implemented Organizational Management and need to re-customize Personnel Administration, you can automatically copy and transfer the existing entries for the *Organizational Assignment* infotype (0001).
- If you want to implement Organizational Management and Personnel Administration components again, you do not have to manually enter the data in Personnel Administration as the data that was entered when the systems were previously integrated will be maintained in the Organizational Management component.

Integration and the Organization and Staffing Interface

The *Organization and Staffing* interface is divided into two sections, Object Manager and Workspace .

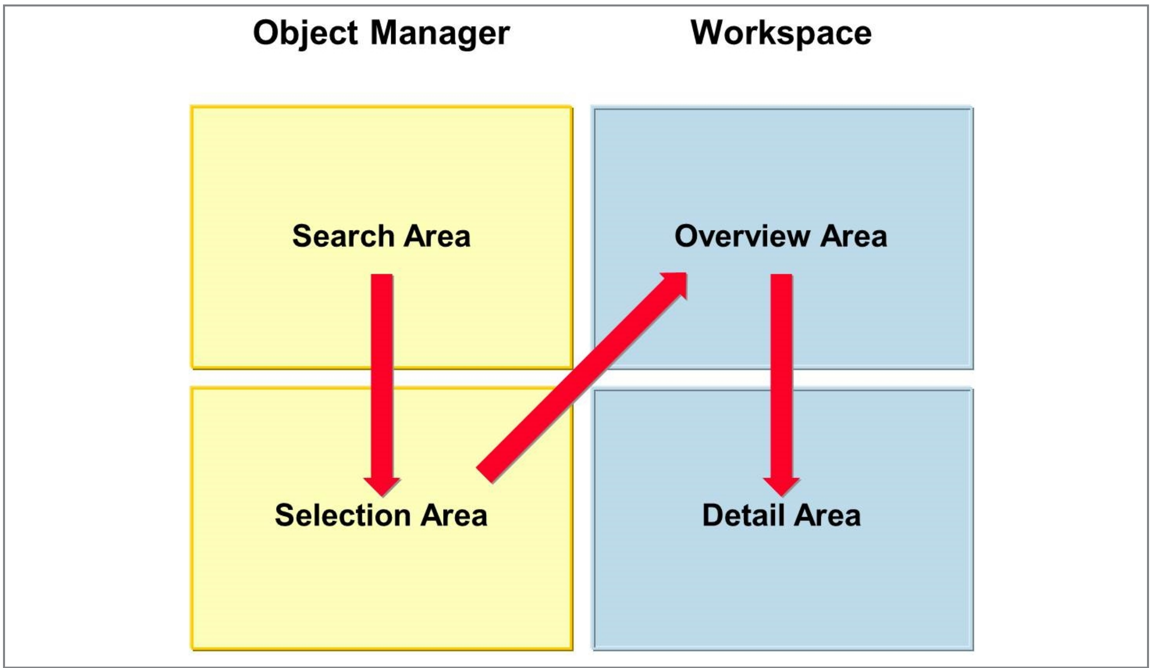


Figure 47: Organization and Staffing Interface Layout

The Object Manager section has two parts, Search Area and Selection Area and the Workspace section has two parts, Overview Area and Detail Area .

Account Assignment Tab Page

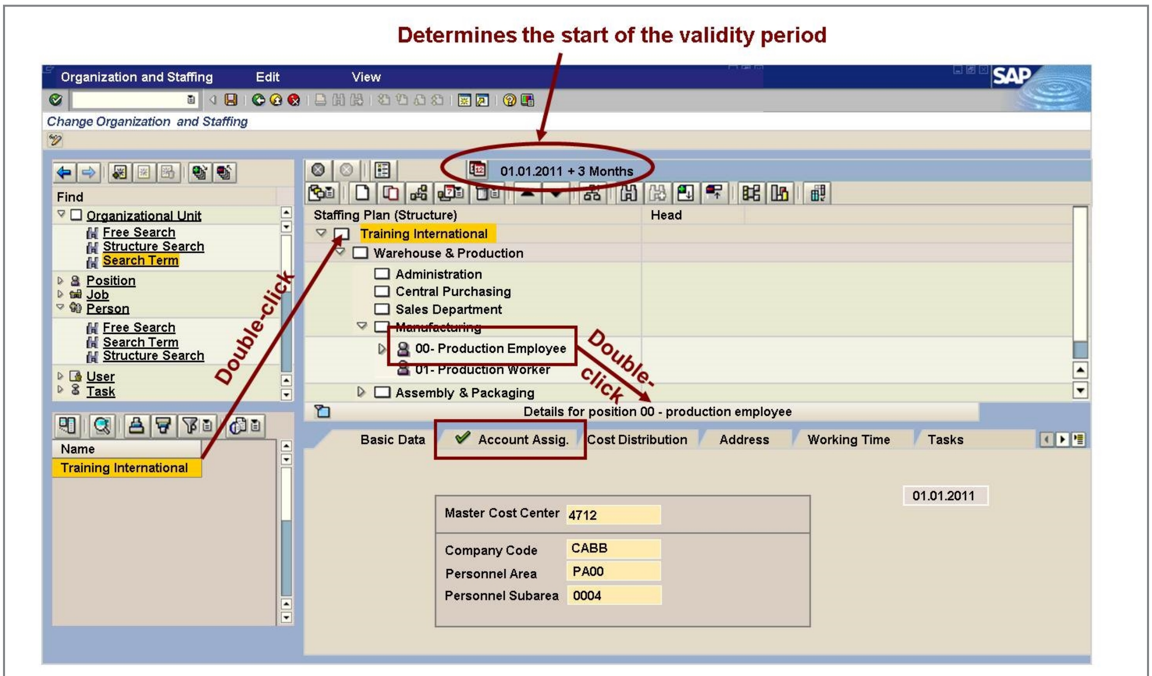


Figure 48: Maintaining a Position: Account Assignment

You can set up the following using the *Account Assignment* tab page:

- The figure Maintaining a Position: Account Assignment shows you how the system stores the relationships between the positions and the enterprise structure.

- To depict your enterprise's cost center hierarchy in the system, you can link the cost centers to the relevant organizational units. You can also link the cost centers to positions.

Working Time Tab Page

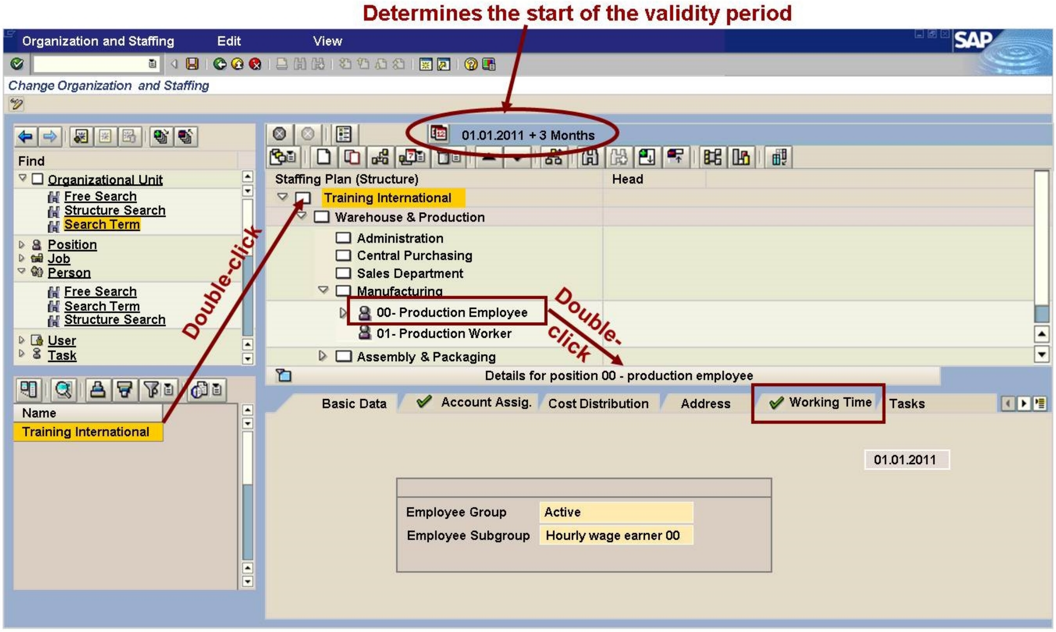


Figure 49: Maintaining a Position: Working Time

The figure shows you how the system stores the relationships between the positions and the personnel structure on the *Working Time* tab page.

LESSON SUMMARY

You should now be able to:

- Activate integration between Organizational Management and Personnel Administration
- Set up objects to facilitate data integration between organization and staffing and personnel administration

Utilizing Default Values

LESSON OVERVIEW

This lesson shows you how to control the values, including default values, in Organizational Management.

Business Example

When new employees join your organization, you need to hire them into your personnel subarea. For this reason, you require the following knowledge:

- An understanding of how to control the values in Organizational Management

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Control organizational management values to default to personnel administration values

Consequences of Integration

If you integrate Organizational Management and Personnel Administration, you can enter a position in the *Actions* infotype (0000) when you run a hiring action.

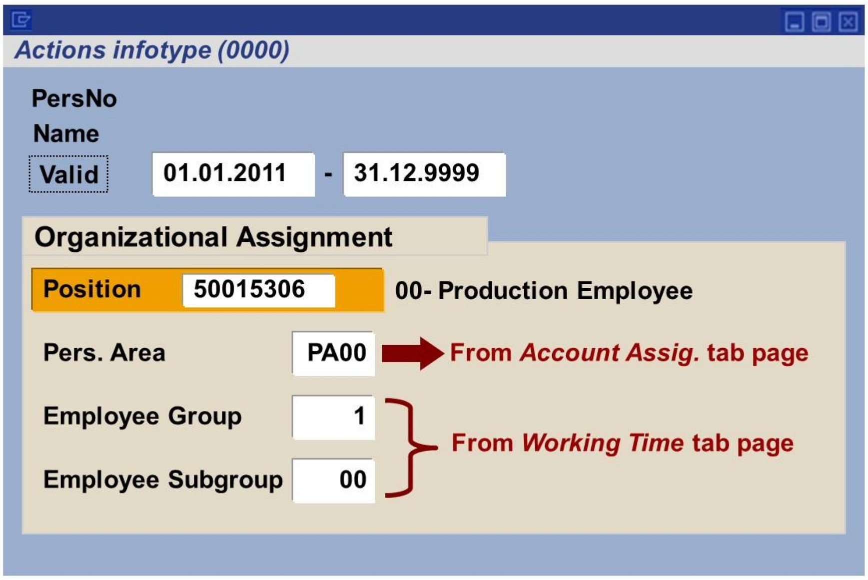


Figure 50: Entering the Position in the Actions Infotype

When you enter the position in the *Actions* infotype, the system populates the data stored in Organizational Management to the fields in the *Actions* infotype (0000), as shown in the figure.

Values from Organizational Management

The system takes the default values for the employee group and subgroup from the data stored in the position in the *Employee Group* or *Subgroup* infotype (1013). You can maintain these default values on the *Working Time* tab page.

The system takes the default values for the business area, personnel area, and personnel subarea from the data stored in the position or the organizational unit in the *Account Assignment Features* infotype (1008). You can maintain these default values on the *Account Assignment* tab page.

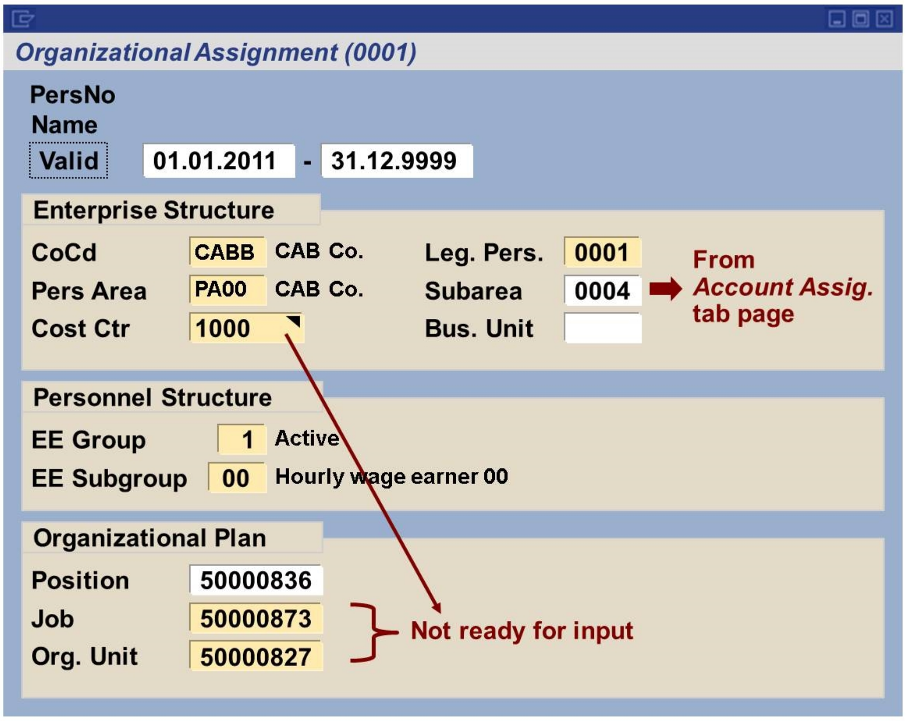


Figure 51: Values from Organizational Management

If the Personnel Administration and Organizational Management components are not integrated, you must manually enter the values for the cost center, position, job, and organizational unit in the *Organizational Assignment* infotype.

However, if Organizational Management and Personnel Administration are integrated, you cannot maintain these fields in the *Organizational Assignment* infotype. The system fills these fields automatically from Organizational Management.

LESSON SUMMARY

You should now be able to:

- Control organizational management values to default to personnel administration values

Unit 5

Learning Assessment

1. An enterprise uses a(n) ______________ to represent the relationships between departments and work groups.

   Choose the correct answer.

   ☐ A reporting structure

   ☐ B job

   ☐ C position

   ☐ D organizational plan

2. A job is the general classification for a set of tasks in an enterprise.

   Determine whether this statement is true or false.

   ☐ True

   ☐ False

3. Jobs represent a specific job entity or a concrete area in an enterprise and are occupied by people.

   Determine whether this statement is true or false.

   ☐ True

   ☐ False

4. ______________ are occupied by persons or employees.

   Choose the correct answer.

   ☐ A Organizational units

   ☐ B Jobs

   ☐ C Positions

5. You can use the *PLOGI ORGA* switch to determine whether or not integration exists between Organizational Management and Personnel Administration.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

6. If you have implemented Personnel Administration and need to re-customize Organizational Management, the system converts the entries in the relevant Personnel Administration tables for the personnel planning objects.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

7. The *Organization and Staffing* interface is divided into two broad sections, ______________ and ______________.

   Choose the correct answer.

   - [ ] A Object Manager and Selection Area
   - [ ] B Overview Area and Detail Area
   - [ ] C Overview Area and Workspace
   - [ ] D Object Manager and Workspace

8. To depict your enterprise's cost center hierarchy in the system, you can link the cost centers to the relevant organizational units.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

9. The system stores the relationships between the positions and the personnel structure using the *Account Assignment* tab page.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

10. If Organizational Management and Personnel Administration are integrated, you need to enter the values manually for the cost center, position, job, and organizational unit in the *Organizational Assignment* infotype.

    Determine whether this statement is true or false.

    - [ ] True
    - [ ] False

11. When you enter a position in the *Actions* infotype, the system populates the data stored in Organizational Management to the *Personnel area* , *Employee group* , and *Employee subgroup* fields.

    Determine whether this statement is true or false.

    - [ ] True
    - [ ] False

Learning Assessment - Answers

1. An enterprise uses a(n) ______________ to represent the relationships between departments and work groups.

   Choose the correct answer.

   - [ ] A reporting structure
   - [ ] B job
   - [ ] C position
   - [X] D organizational plan

2. A job is the general classification for a set of tasks in an enterprise.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

3. Jobs represent a specific job entity or a concrete area in an enterprise and are occupied by people.

   Determine whether this statement is true or false.

   - [ ] True
   - [X] False

4. ______________ are occupied by persons or employees.

   Choose the correct answer.

   - [ ] A Organizational units
   - [ ] B Jobs
   - [X] C Positions

5. You can use the *PLOGI ORGA* switch to determine whether or not integration exists between Organizational Management and Personnel Administration.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

6. If you have implemented Personnel Administration and need to re-customize Organizational Management, the system converts the entries in the relevant Personnel Administration tables for the personnel planning objects.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

7. The *Organization and Staffing* interface is divided into two broad sections, ______________ and ______________.

   Choose the correct answer.

   - [ ] A Object Manager and Selection Area
   - [ ] B Overview Area and Detail Area
   - [ ] C Overview Area and Workspace
   - [x] D Object Manager and Workspace

8. To depict your enterprise's cost center hierarchy in the system, you can link the cost centers to the relevant organizational units.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

9. The system stores the relationships between the positions and the personnel structure using the *Account Assignment* tab page.

   Determine whether this statement is true or false.

   - [ ] True
   - [x] False

10. If Organizational Management and Personnel Administration are integrated, you need to enter the values manually for the cost center, position, job, and organizational unit in the *Organizational Assignment* infotype.

    Determine whether this statement is true or false.

    - [ ] True
    - [x] False

11. When you enter a position in the *Actions* infotype, the system populates the data stored in Organizational Management to the *Personnel area* , *Employee group* , and *Employee subgroup* fields.

    Determine whether this statement is true or false.

    - [x] True
    - [ ] False

UNIT 6 Additional Organizational Assignments

UNIT OBJECTIVES

- Outline the additional organizational assignments for employees
- Configure a payroll area to group employees for payroll processing
- Display elements of a payroll record
- Enable payroll processing
- Add information to the organization assignment infotype
- Customize the administrator table
- Locate tables containing employee attribute characteristics

Unit 6
Lesson 1

Identifying Additional Organization Assignments

LESSON OVERVIEW

This lessons explains the meaning of payroll area and payroll control record.

Business Example:

As a personnel administrator, you need to create a payroll area for various payroll dates and display the payroll control record for each payroll area. For this reason, you require the following knowledge:

- An understanding of how to create a payroll area
- An understanding of how to display the payroll control record

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Outline the additional organizational assignments for employees
- Configure a payroll area to group employees for payroll processing
- Display elements of a payroll record
- Enable payroll processing

Additional Organizational Assignments

You can also set the indicators for authorization checks and payroll control using the *Organizational Assignment infotype* (0001).

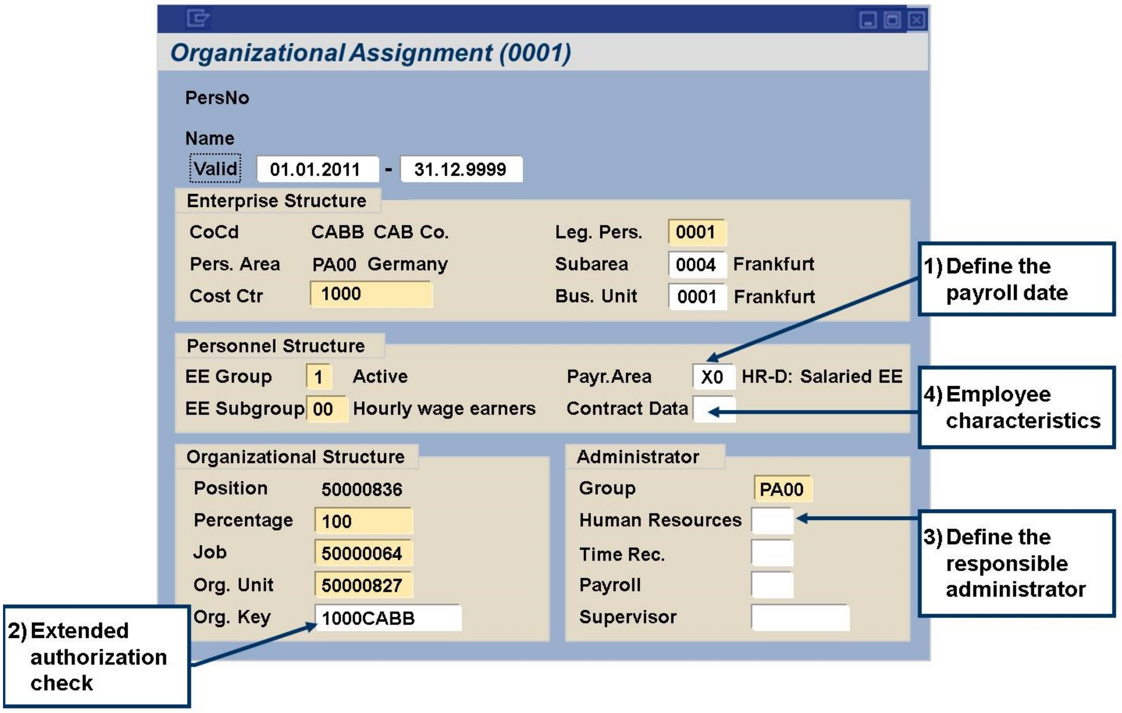


Figure 52: Additional Organizational Assignment of an Employee

Payroll Area

Human Capital Management (HCM) uses the payroll areas for the following purposes:

- To group employees who should be processed by payroll on the same day
- To determine the precise date of the payroll

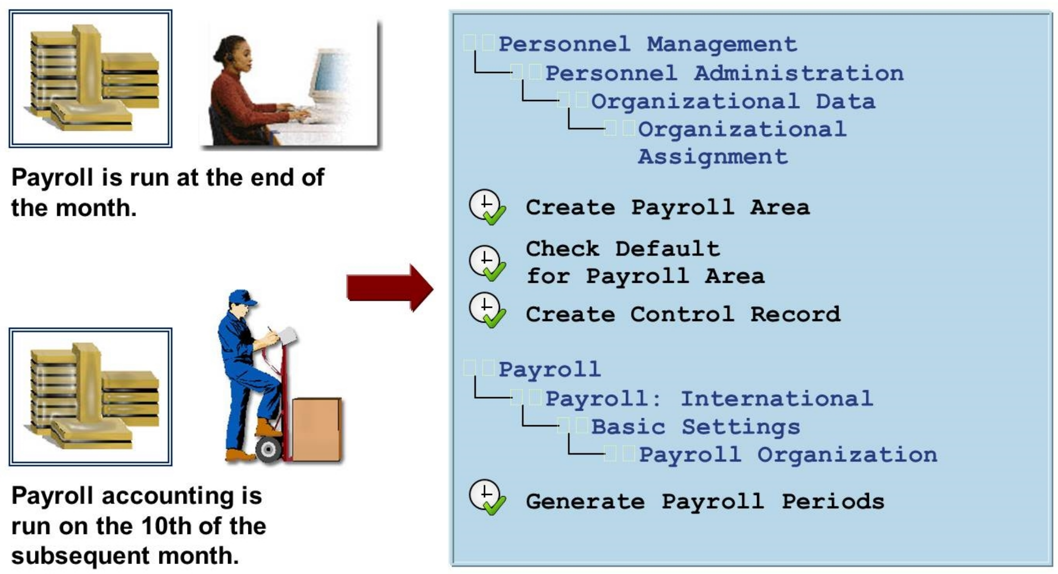


Figure 53: Payroll Area

Employees belonging to different employee subgroups can belong to the same payroll area. For example, if the enterprise pays all of its salaried employees at the end of the month and all

of its hourly-paid employees on the tenth of the following month, then it would need at least two payroll areas.

The right side of the figure Payroll Area shows the Customizing steps that you need to set up the following:

- Payroll areas
- Control record
- Payroll periods

Functions of Payroll Area

The payroll area is an organizational entity that groups employees so that you can run payroll. You group employees in the same payroll area according to the *Organizational Assignment* criteria. For example, you can group all employees for whom you run payroll on the same day and in the same frequency (such as monthly).

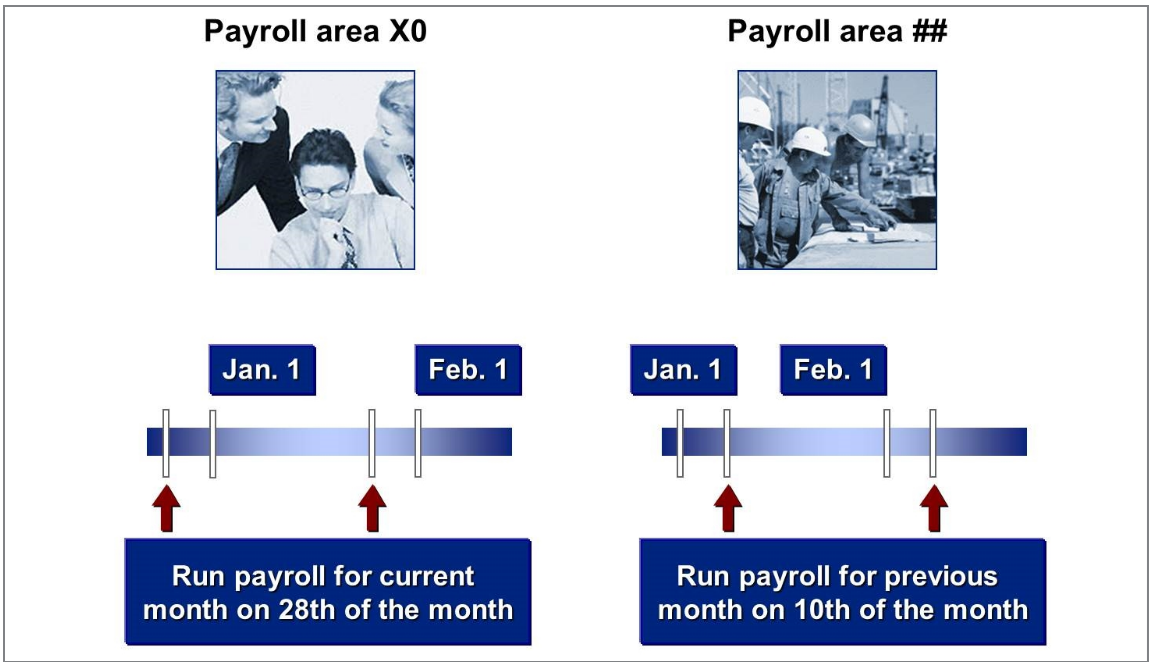


Figure 54: Payroll Organization

The payroll area has the following two functions that are required for payroll:

- It groups the personnel numbers to be accounted in the same period.
- It defines the exact date of the payroll period.

Personnel numbers are assigned to payroll areas in the *Organizational Assignment* infotype (0001). The default value that appears in the *Payr . Area* field may depend on the personnel area/personnel subarea/employee group/employee subgroup assigned to the employee.

Payroll Control Record

You must create a control record for each payroll area. The control record controls the individual payroll stages.

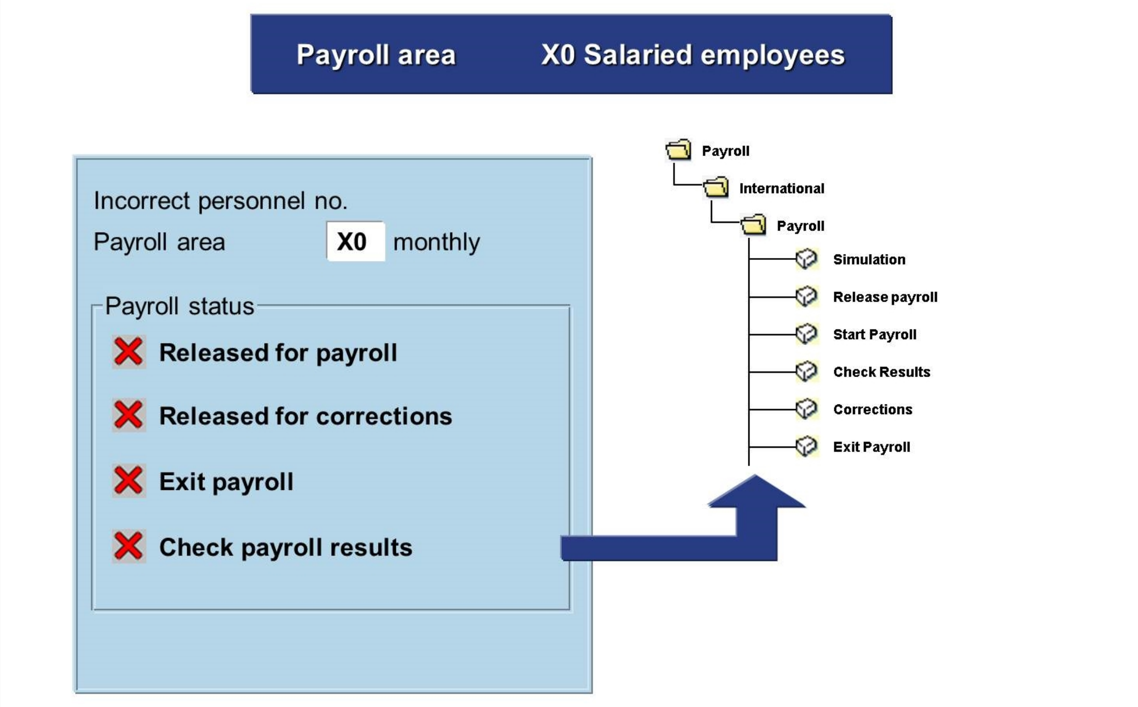


Figure 55: Payroll Control Record

The control record has the following functions:

- Determines the exact date of the current payroll period.
- Defines the past payroll for retroactive payroll.
- Locks the master data and time data during the payroll run to prevent any changes. This lock can be set for both past and present payrolls. You can still change payroll data in the future.
- Defines the earliest retroactive accounting period for the payroll area.

The different stages of payroll are as follows:

- Released for payroll
- Released for corrections
- Exit payroll
- Check payroll results

You will find the individual payroll stages in the *Payroll* menu option. You can start, check, correct, and exit payroll from this menu option.

Payroll Organization

You need to make certain basic Customizing settings to run payroll in the SAP system.

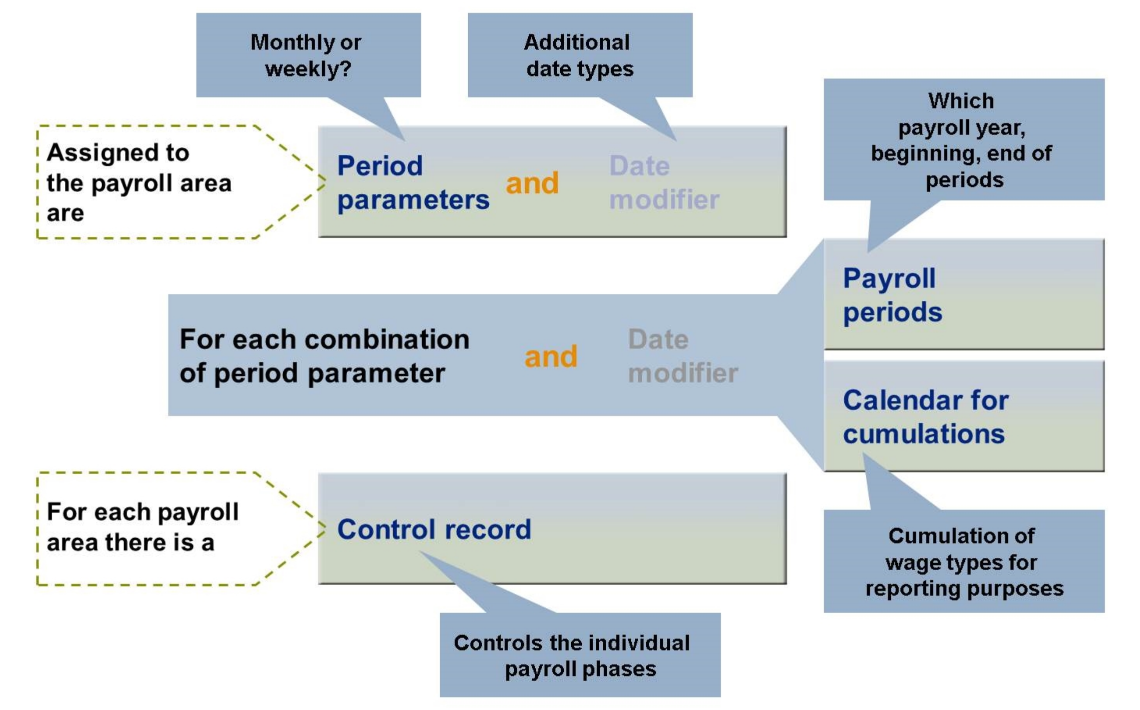


Figure 56: Overview – Payroll Organization

The Customizing settings are as follows:

- Each payroll area is assigned a period parameter and a date modifier .

> Note:
> The date modifier is relevant only in some countries. The period parameter specifies whether payroll is run monthly, bimonthly, or weekly. Each period parameter is assigned to a time unit. The values for the time units are fixed: monthly, bimonthly, semi-monthly, weekly, fortnightly, every four weeks, or annually.

- You must generate payroll periods for each combination of period parameter and date modifier assigned to a payroll area.

> Note:
> Depending on the period parameter, all periods in the specified time interval are determined. The system determines the start date and end date of each period and calculates the payday using a rule that is also to be specified as a parameter. Payroll year and payroll period define the specific payroll dates.

- You must create a control record for each payroll area. The control record controls the individual stages of payroll.

Customizing

From the IMG, choose *Payroll* → *Payroll: <your country>* → *Basic Settings* → *Payroll Organization* to access the IMG steps in Payroll Customizing for your country.

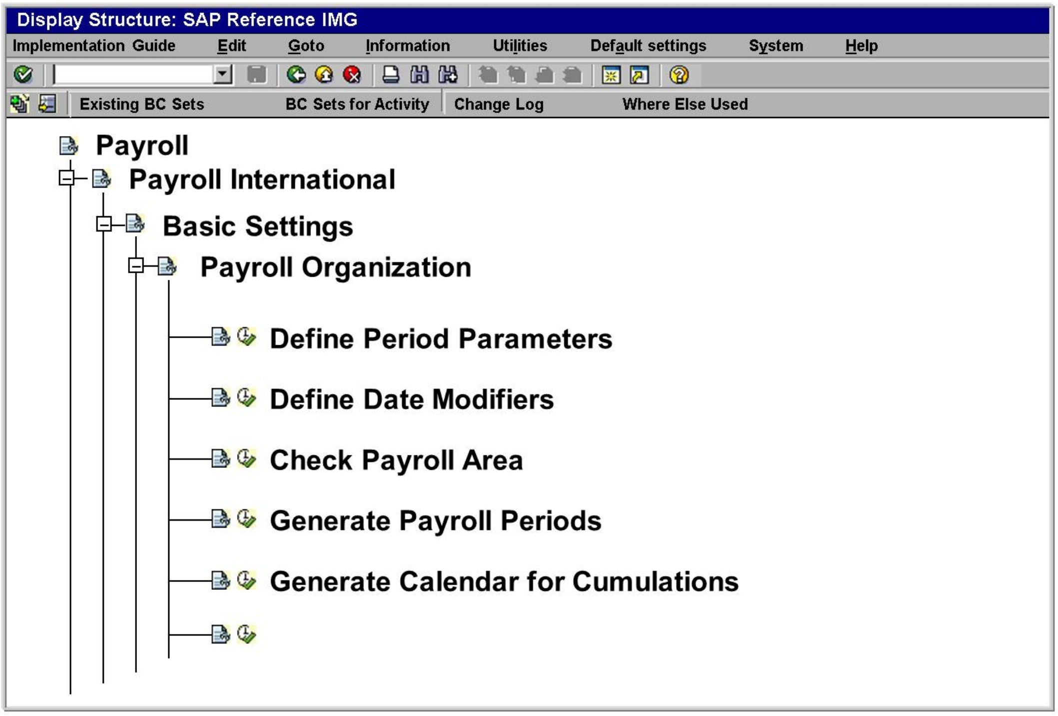


Figure 57: Set Up Using Customizing

Payroll Periods

A **payroll period** determines the period in which a payroll result is generated. The duration of payroll periods can differ, for example, monthly, weekly, or fortnightly.

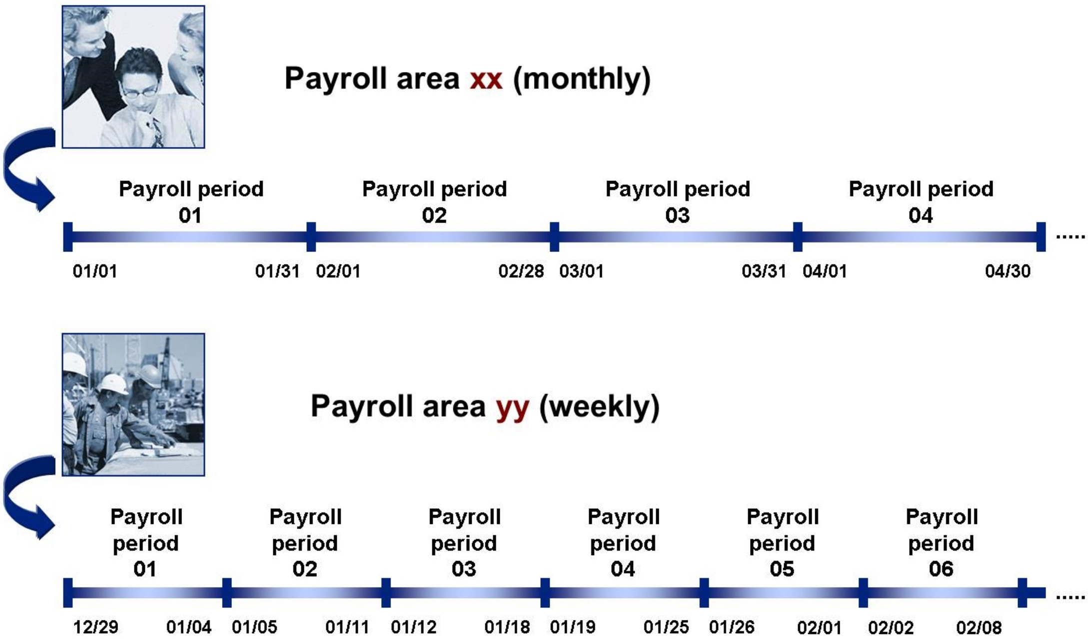


Figure 58: Payroll Periods

For payroll areas, you need to specify the start date and end date of the periods to determine the specific payroll dates. This data is automatically generated when you start a program.

Generation of Monthly Payroll Periods

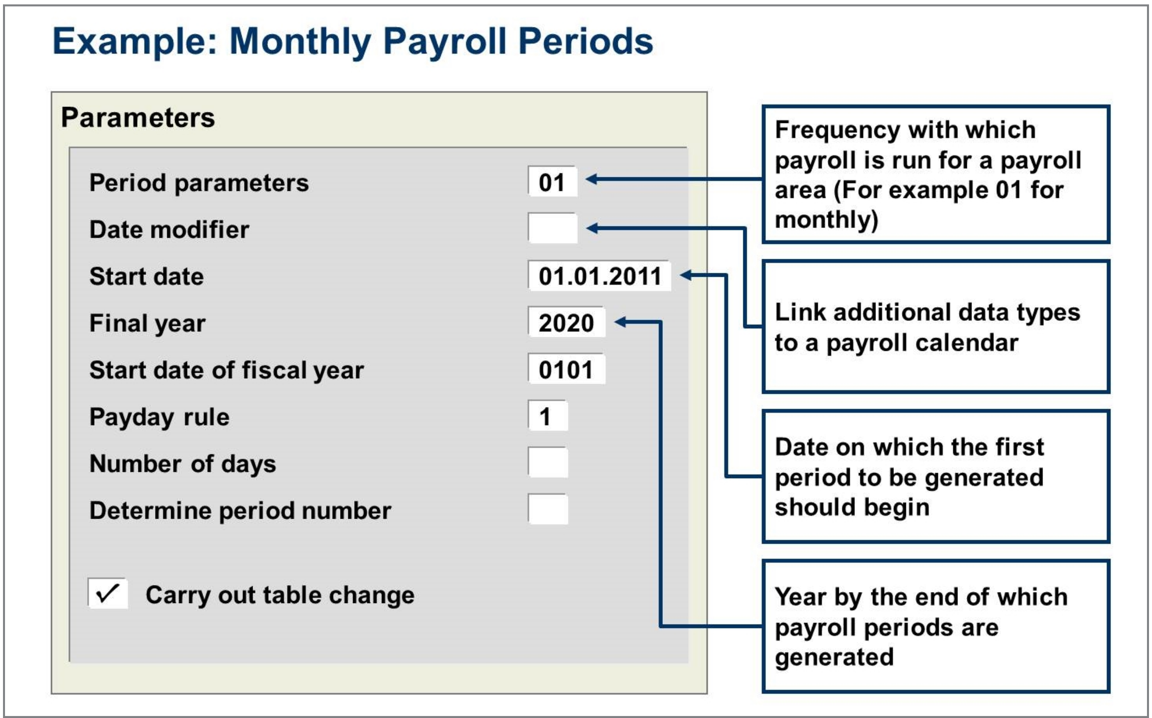


Figure 59: Generation of Monthly Payroll Periods

You link payroll periods to time units that are appended to the corresponding period modifier in the *Generate Payroll Periods* IMG activity. In this activity, you can also specify how paydays are defined to identify the start of the fiscal year.

In addition to the start date and end date of a period and of the payday, you can define a date modifier as an additional payroll-relevant date. This is a modifier you use to link additional date types to a payroll calendar.

You can generate other date specifications for each period in the payroll calendar besides the defined date specifications for the standard payroll interval. You can use the other date specifications to store the payday, for example.

The example in the figure shows how you generate payroll periods for a monthly period modifier. Here, the start date and end date of a period coincide with the start date and end date of a calendar month. You use these settings to generate payroll periods for 60 months, that is, the start date until end of final year.

Caution:
The input screen of the report changes dynamically according to country grouping.

Generation of Weekly Payroll Periods

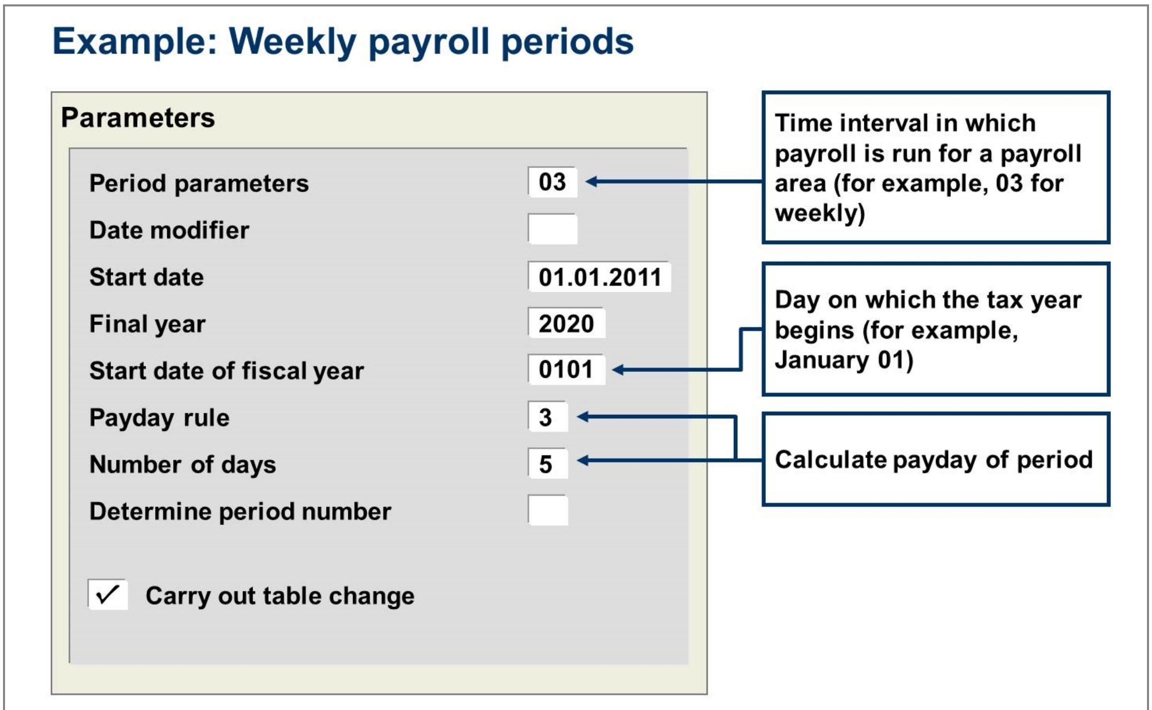


Figure 60: Generation of Weekly Payroll Periods

The *Payday rule* and *Number of days* fields determine how the payday of the period is calculated.

You can enter the following possible values in the Payday rule field:

- The number of days is added to the start date of the period to calculate the payday.
- The number of days is deducted from the end date of the period.
- The number of days is added to the end date of the period.
- The number of days is used as the exact date. This is valid only for monthly payroll periods.

In the *Determine period number* field, you define the date of the payroll period that the system uses to determine the period number. The system uses the period number in the payroll control record to continually project the payroll periods of a year. The system starts the counting of period numbers again from one at the beginning of each fiscal year.

The example in the figure shows how you can pay the employee for the previous week's work every Thursday (Start date: July 1, 2001; Payday period: Sunday to Saturday). The Payday rule *3* specifies that the number of days (*5*) is added to the end date of the period.

Generating a Calendar for Cumulations

Certain countries require the calendar for reporting purposes. Therefore, in payroll, some wage types are cumulated over several periods to obtain, for example, monthly, quarterly, or annual totals.

Period	Year	Type	No.	Year
01	2011	M	01	2011
02	2011	M	02	2011
.				
.				
.				
01	2011	Q	01	2011
02	2011	$\boxed{\text{Q}}$	01	2011

Cumulation type, for example:

M = monthly
Q = quarterly
X = biannually
Y = annually
U = unlimited

Figure 61: Generating Calendar for Cumulations

During calendar generation, each payroll period is assigned to a quarter, half year, or year. You must generate the calendar for each combination of period parameter and date modifier that is assigned at a lower level to a payroll area.

You can generate this cumulation calendar for several years in advance using a report in Customizing.

LESSON SUMMARY

You should now be able to:

- Outline the additional organizational assignments for employees
- Configure a payroll area to group employees for payroll processing
- Display elements of a payroll record
- Enable payroll processing

Identifying the Organizational Key

LESSON OVERVIEW

This lesson explains how you can define the organizational key.

Business Example:

You need to set up an organizational key to enhance authorization checks. For this reason, you require the following knowledge:

- An understanding of how to set up the organizational key

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Add information to the organization assignment infotype

Organizational Key

You can use the organizational key to enhance authorization checks in conjunction with the HCM master data authorization object.

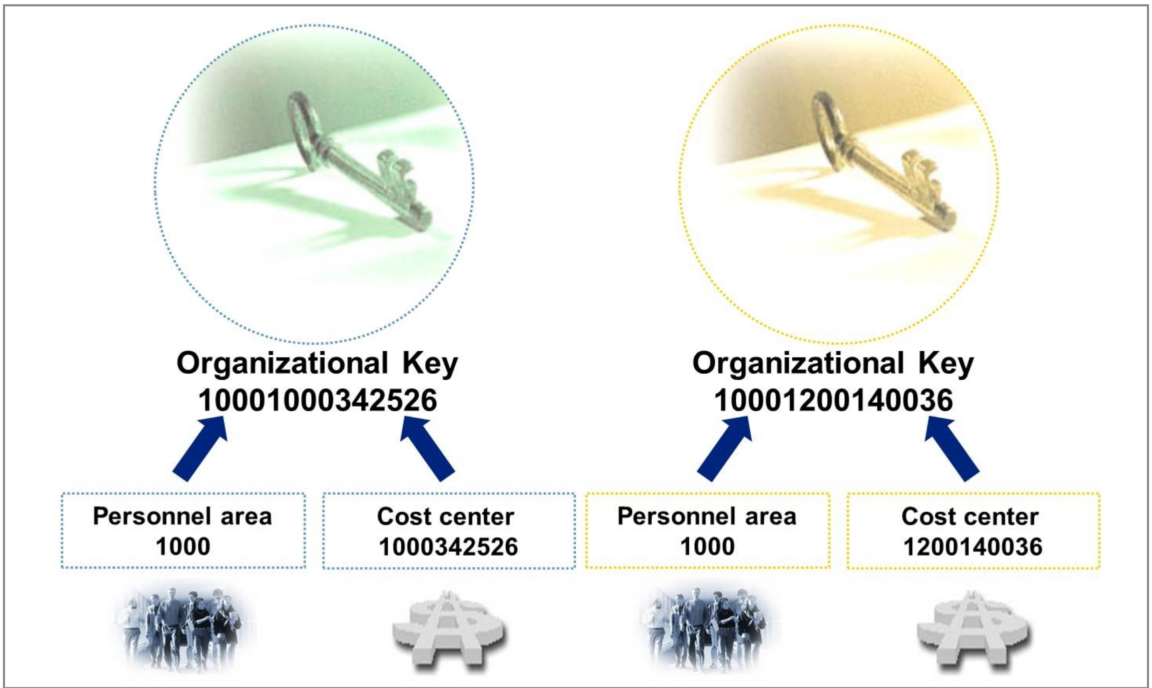


Figure 62: Organizational Keys for Additional Authorization Checks

The organizational key is a 14-character field in the *Organizational Assignment* infotype (0001) that you can structure according to your own requirements.

You can set up the organizational key using specific control and rule tables. To do this, choose *SAP Customizing Implementation Guide* → *Personnel Management* → *Personnel Administration* → *Organizational Data* → *Organizational Assignment* → *Set up organizational key* on the *IMG* screen.

> Caution:
> Do not confuse the organizational key with the organizational unit.

LESSON SUMMARY

You should now be able to:

- Add information to the organization assignment infotype

Unit 6
Lesson 3

Configuring Administrator Tables

LESSON OVERVIEW

This lesson explains how you can configure an administrator table.

Business Example

You need to be aware of all the changes made in the employee data. For this reason, you require the following knowledge:

- An understanding of how to configure an administrator table

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Customize the administrator table

Administrator Tables

In the *Organizational Assignment* infotype (0001), you can enter three different administrators.

The three different administrators are as follows:

- Personnel Administrator
- Time Administrator
- Payroll Administrator

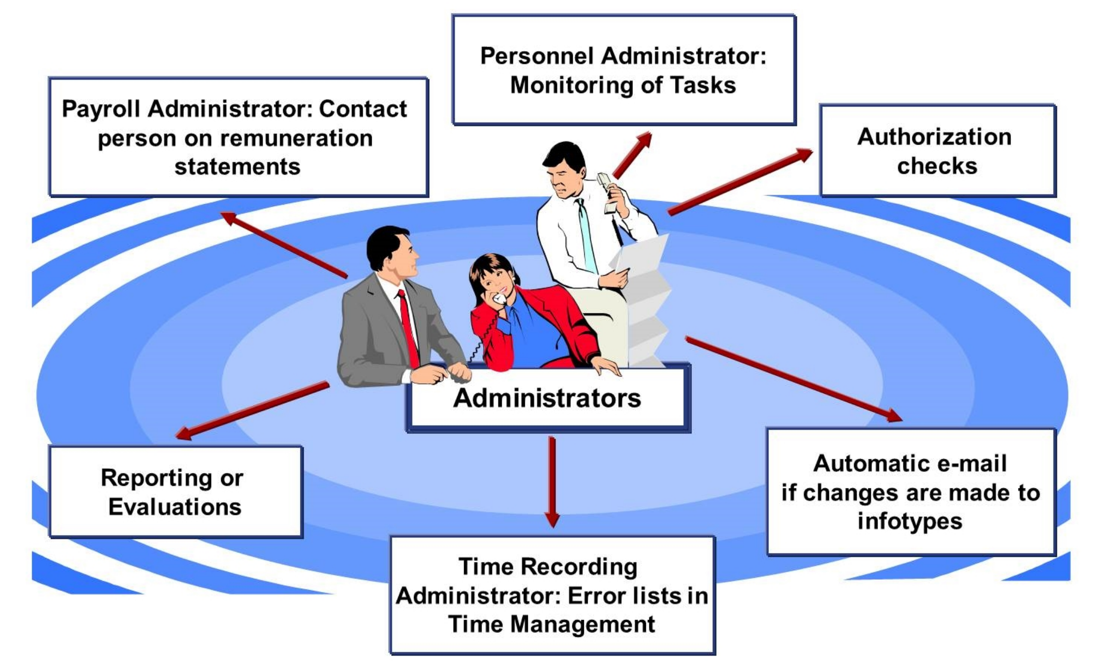


Figure 63: Administrator Responsible for Personnel Administration

The following are the examples of use of an administrator:

- The administrator (in this instance, the “time administrator”) can use standard SAP reports as a selection criterion. This ensures that the time administrator only creates a list of his or her employees.
- You can print the administrator on the remuneration statement so that employees are aware of the contact person for queries.

You can call the relevant Customizing activity to create administrator groups and administrators. To do this, in the IMG, choose *Personnel Management* → *Personnel Administration* → *Organizational Data* → *Organizational Assignment* → *Define administrator* .

In the *Define Administrator Groups* activity, you can call the *PINCH* feature that determines the administrator group in the *Organizational Assignment* infotype.

Administrator Assignment

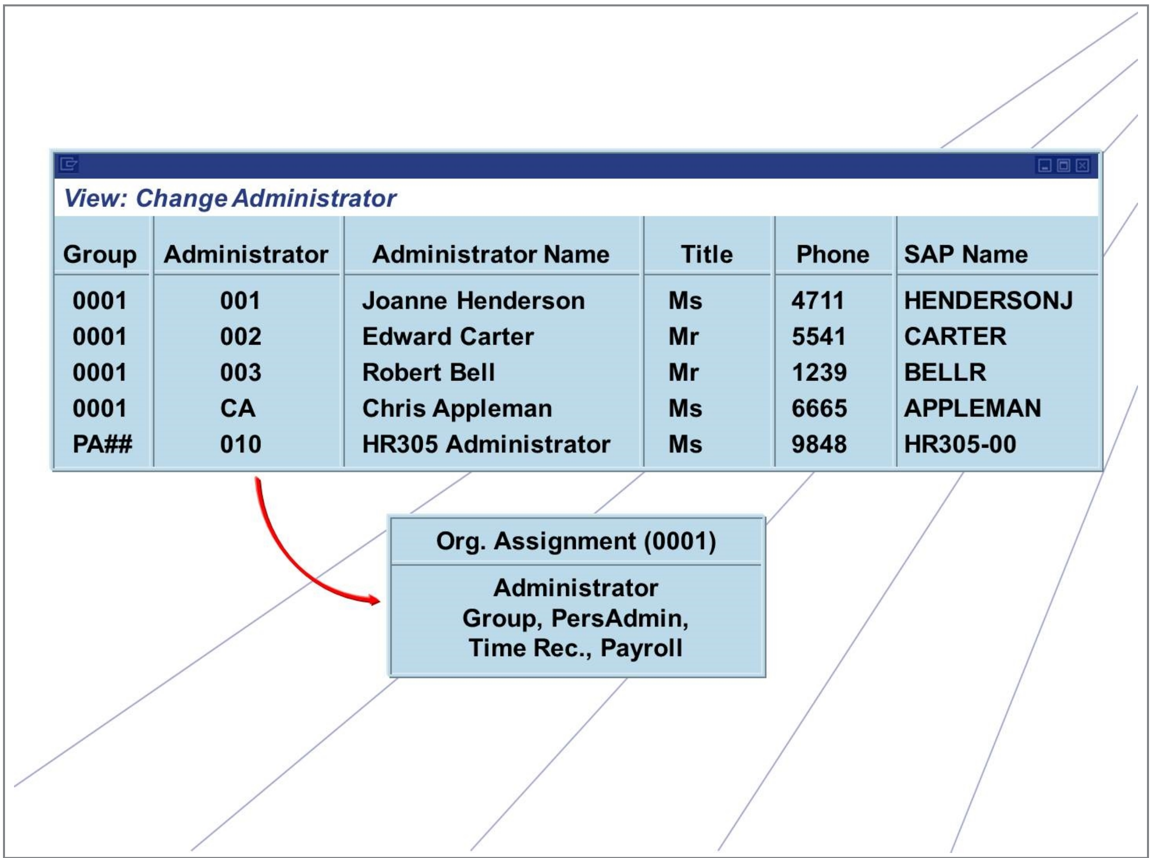


Figure 64: Administrator Assignment

During Customizing, you enter the administrator for each administrator group. These are the administrators that you want to enter in the *Organizational Assignment* infotype.

The administrator table stores the following information centrally:

- Administrator's name
- Form of address
- Telephone number

In addition, you can enter the SAP names, that is, the administrator's SAP user. When a user makes changes to infotype records, you can use this SAP name to trigger an automatic message e-mail that is sent to the administrator who is responsible for this task.

LESSON SUMMARY

You should now be able to:

- Customize the administrator table

Confirming Employee Attributes

LESSON OVERVIEW

This lesson shows you how to assign different attributes to the employees of your employee subgroups.

Business Example

As a personnel administrator of your company, you have to assign different attributes to employee data. For this reason, you require the following knowledge:

- An understanding of employee attributes

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Locate tables containing employee attribute characteristics

Employee Attributes

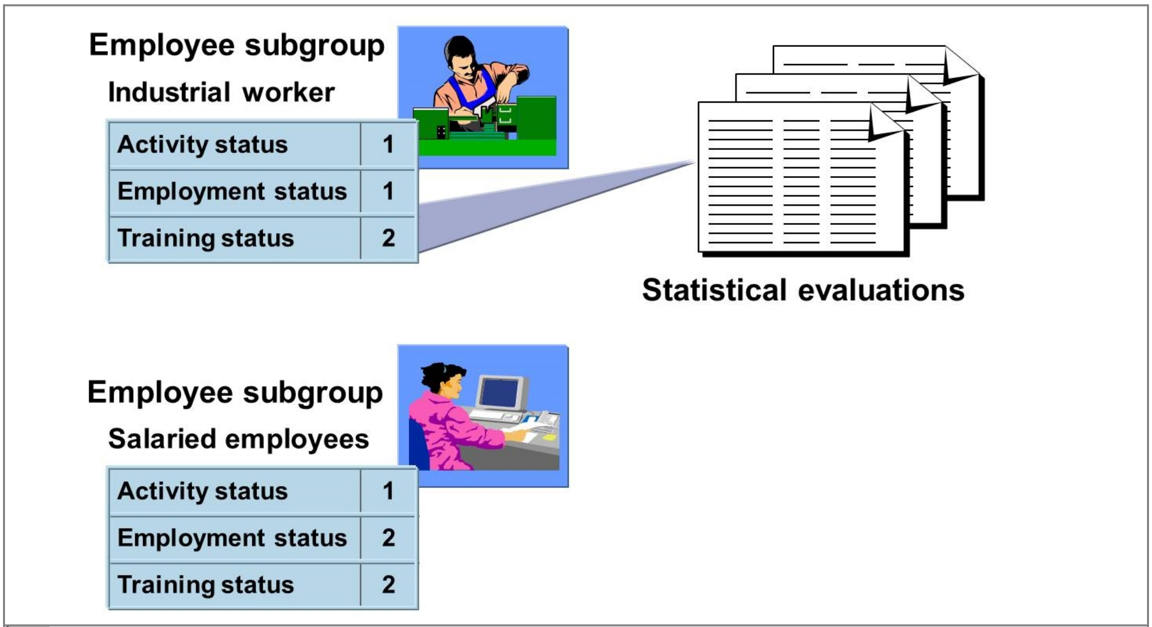


Figure 65: Employee Attributes

You have defined your employee groups and subgroups in your personnel structure. You must now assign an activity status, employment status, or training status value to the employee subgroups.

In several countries, this information is sent from the State Statistics Office . To store this information in the Customizing step, you need to choose *Personnel Management* →

Personnel Administration → Organizational Data → Organizational Assignment → Define employee attributes on the IMG screen .

For activity status, following are the possible entries:

- 1 = Active
- 2 = Retiree
- 3 = Early Retiree
- 9 = Other

For employment status, following are the possible entries:

- 1 = Industrial Worker
- 2 = Salaried Employee
- 3 = Clerk
- 9 = Other

For training status, following are the possible entries:

- 1 = Trainee/Apprentice
- 2 = Trained
- 9 = Other

> Note:
> The existing values are transferred from the copy template when you copy the employee subgroup using the entity copier.

If necessary, you can specify additional differentiation in the employee statuses of your employees so that they are not dependent on the employee subgroup assignments but are created in the *Terms of Employment field* of the *Organizational Assignment* infotype. To do this, in the IMG, choose *Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Define terms of employment* .

> Note:
> National and international evaluations use these statuses to select and summarize personal data or to represent national features.

LESSON SUMMARY

You should now be able to:

- Locate tables containing employee attribute characteristics

Learning Assessment

1. The payroll area is an organizational entity that groups employees so that you can run payroll.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. Which of the following are the functions of control record?

   Choose the correct answers.

   - [ ] A It defines the past payroll for retroactive payroll.
   - [ ] B It is used to group employees who only belong to the same employee subgroup.
   - [ ] C It defines the earliest retroactive accounting period for the payroll area.
   - [ ] D It locks the master data and time data during the payroll run to prevent any changes.

3. Each payroll area is assigned a date parameter and a period modifier.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

4. The system does not start the counting of period numbers again from one at the beginning of each fiscal year.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

5. The organizational key is used to enhance authorization checks in conjunction with the HCM master data authorization object.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

6. The organizational key is a 24-character field in the *Organizational Assignment* infotype.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

7. In the *Define Administrator Groups* activity, you can call the *PINCH* feature that determines the administrator group in the *Organizational Assignment* infotype.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

8. In the *Organizational Assignment* infotype (0001), you can enter three different administrators.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

9. What are the possible entries for activity status?

   Choose the correct answers.

   - [ ] A 1 = Active
   - [ ] B 2 = Retiree
   - [ ] C 3 = Clerk
   - [ ] D 1 = Trainee/Apprentice

10. What are the possible entries for training status?

    Choose the correct answers.

    - [ ] A 2 = Trained
    - [ ] B 3 = Early Retiree
    - [ ] C 1 = Trainee/Apprentice
    - [ ] D 2 = Salaried Employee

Learning Assessment - Answers

1. The payroll area is an organizational entity that groups employees so that you can run payroll.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

2. Which of the following are the functions of control record?

   Choose the correct answers.

   [X] A It defines the past payroll for retroactive payroll.

   [ ] B It is used to group employees who only belong to the same employee subgroup.

   [X] C It defines the earliest retroactive accounting period for the payroll area.

   [X] D It locks the master data and time data during the payroll run to prevent any changes.

3. Each payroll area is assigned a date parameter and a period modifier.

   Determine whether this statement is true or false.

   [ ] True

   [X] False

4. The system does not start the counting of period numbers again from one at the beginning of each fiscal year.

   Determine whether this statement is true or false.

   [ ] True

   [X] False

5. The organizational key is used to enhance authorization checks in conjunction with the HCM master data authorization object.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

6. The organizational key is a 24-character field in the *Organizational Assignment* infotype.

   Determine whether this statement is true or false.

   [ ] True

   [X] False

7. In the *Define Administrator Groups* activity, you can call the *PINCH* feature that determines the administrator group in the *Organizational Assignment* infotype.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

8. In the *Organizational Assignment* infotype (0001), you can enter three different administrators.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

9. What are the possible entries for activity status?

   Choose the correct answers.

   [X] A 1 = Active

   [X] B 2 = Retiree

   [ ] C 3 = Clerk

   [ ] D 1 = Trainee/Apprentice

10. What are the possible entries for training status?

Choose the correct answers.

- [x] A 2 = Trained
- [ ] B 3 = Early Retiree
- [x] C 1 = Trainee/Apprentice
- [ ] D 2 = Salaried Employee

UNIT 7 System Default Values

UNIT OBJECTIVES

- Set up system default values for employee information records
- Configure the ABKRS feature to default the payroll area into the organizational assignment infotype
- Set up the NUMKR system feature
- Update the system feature PINCH to default the administrator group into the organizational assignment infotype (IT0001)

Unit 7
Lesson 1

Setting Up System Default Values

LESSON OVERVIEW

This lesson explains the functions and advantages of features. It also explains how to maintain features that define default values.

Business Example

As part of Human Resource management, you need to prevent personnel administrators from entering master data manually. For this reason, you require the following knowledge:

- An understanding of default values and features

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Set up system default values for employee information records

Default Values

Instead of entering the master data manually, for some fields you can define default values for it. The system proposes these values when infotypes that affect employee master data are maintained.

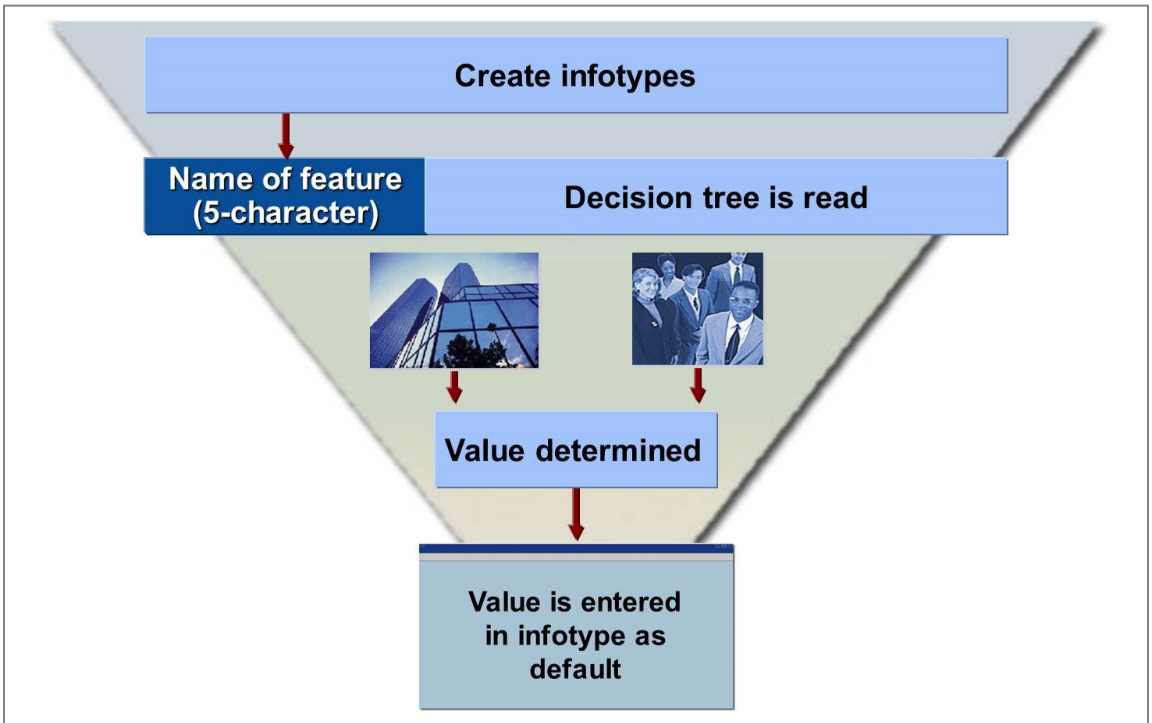


Figure 66: Default Values

The system often uses features based on the fields of the *Organizational Assignment* infotype, such as personnel area, personnel subarea, employee group, and employee subgroup to determine default values. The value proposed in a particular field, (the return value), is based on the configuration of the feature. As a result, the system proposes these default values when you maintain infotypes that affect employee master data.

For example, the ABKRS feature determines default values for the payroll area using employee data from the *Organizational Assignment* infotype. Another example is the LGMST feature, which proposes the wage types permitted for an employee in the *Basic Pay* infotype.

Default Values: Features

Features are objects in the SAP system that query different personnel or data structure fields to determine a specific value. The system uses this value to define defaults and to control certain system processes. In this way, features improve system flexibility.

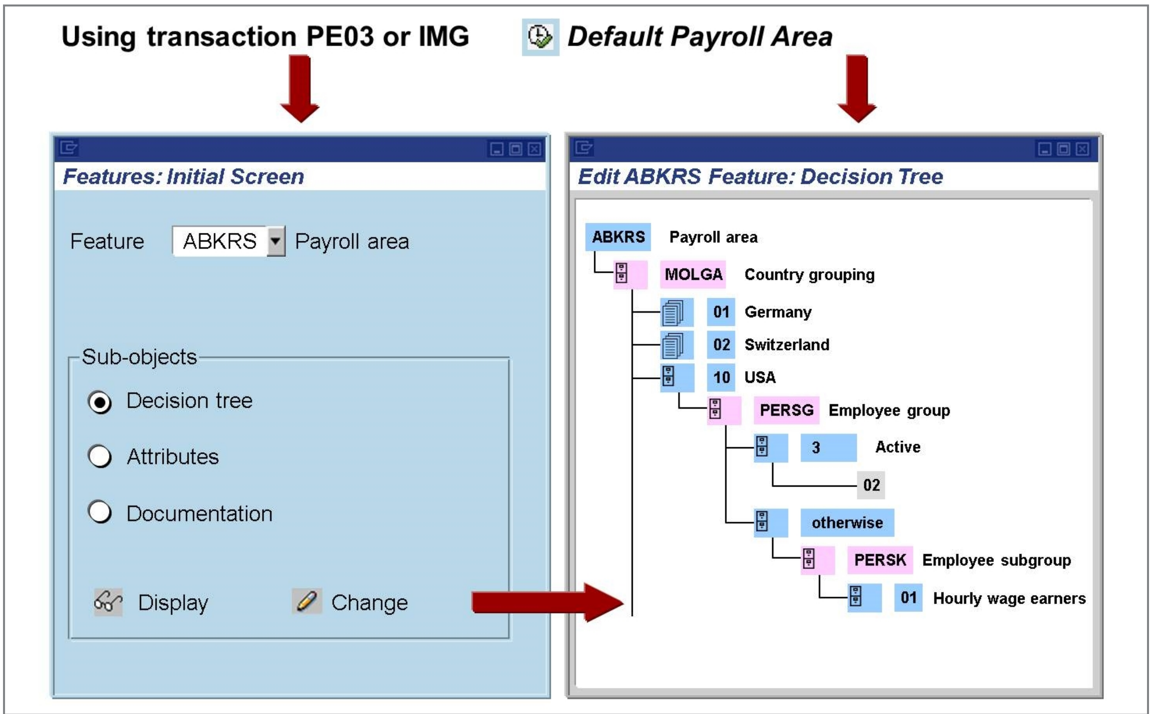


Figure 67: Maintaining Features

Based on the company-specific requirements for default values, a change made to a feature is termed as feature maintenance.

You can call feature maintenance in the following ways:

Call the feature maintenance transaction:

You can call the feature maintenance transaction, PE03, directly. The Features: Initial Screen appears.

Modifying the existing tree structure of the feature:

You can introduce your own decision criteria by modifying the existing tree structure of the feature and giving default values based on company-specific requirements. As shown in the figure, for country USA , employee group, active , the payroll area is 02 . This means that all active employees will be processed together for payroll in the payroll area 02 .

The feature is maintained as a decision tree for determining default values. Decision trees can be simple or complex depending on their function and the number of fields, operations, and decision criteria they contain. After the maintenance, the features need to be activated to become effective.

Note:
Report RPUMKG00 activates features.

Maintaining Features

On the Features: Initial Screen , the following sub-objects appear:

Decision tree:

Decision tree queries data structures to determine return values. You can maintain decision trees using table or tree maintenance.

Attributes:

Attributes includes administration related data of a feature including the structure (fields that can be queries in the decision tree) and country assignment.

Documentation:

Documentation includes information on the structure and the functions.

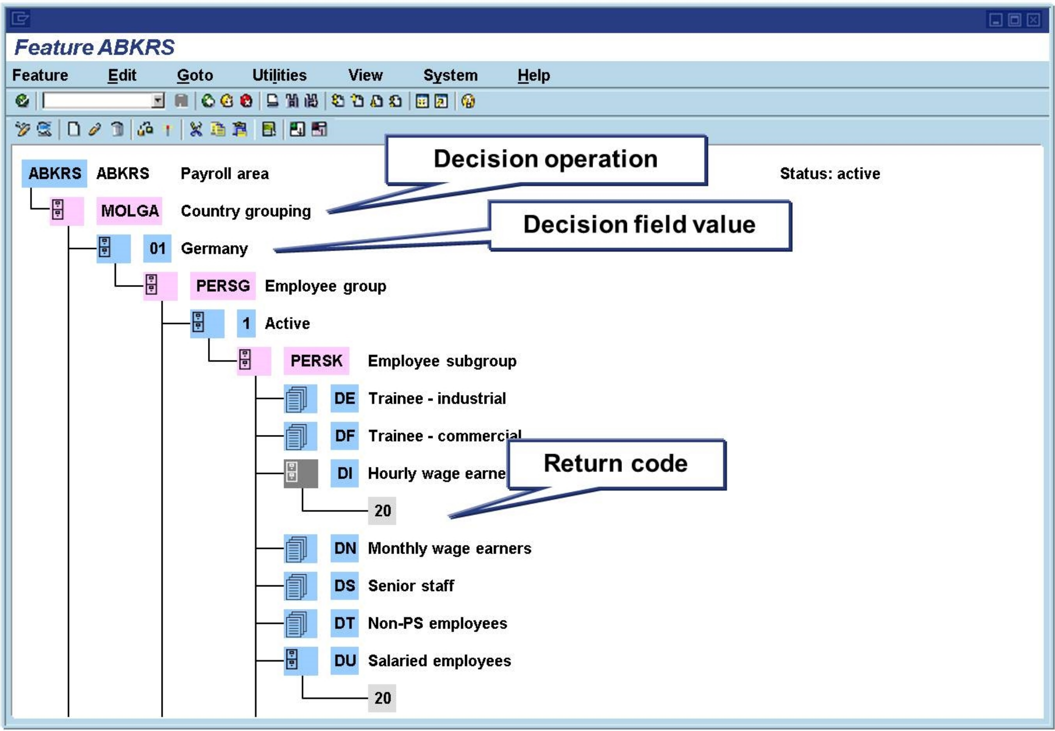


Figure 68: Maintaining Features

The figure above shows how the decision tree of the feature ABKRS queries personnel or data structure fields to determine a specific value or return a specific code. If an employee from Germany belongs to the employee group Active and Employee Subgroup D1 , then the system would automatically default the value 20 in the *Organizational Assignment* infotype (0001).

Applications of Features

Although you can use features for different purposes, their most important applications are:

Features That Define Default Values:

The system often uses features to determine default values. When you maintain infotypes that affect employee master data, the system suggests these default values. The feature either delivers a default value directly that is then written to the relevant infotype field or the feature delivers a key entry as a return code that the system can use to read one or more tables.The system takes the stored default values from these tables and enters them in the relevant infotype. for example, Feature LGMST -> Basic Pay(infotype 0008).

> Hint:
> The system always reads these default values when you create an infotype.

Features That Control System Processes:

Pnnnn features (nnnn stands for the infotype number) control the sequence in which the system displays country-specific screens when you maintain or display master data infotypes.

Features That Automatically Generate Mail Messages:

Some features automatically generate mail messages when you change certain master data fields, such as the various administrators in the *Organizational Assignment* (*0001*) infotype.

For example, feature *M0001* is used in Personal Administration and Recruitment to control the recipient of an e-mail, the conditions under which the e-mail is sent, and the content of the e-mail.

LESSON SUMMARY

You should now be able to:

- Set up system default values for employee information records

Unit 7
Lesson 2

Defaulting the Payroll Area

LESSON OVERVIEW

This lesson explains the ABKRS feature that defines default values for the payroll area.

Business Example

As part of Human Resource management, you need to define default values for the payroll area for your employees. For this reason, you require the following knowledge:

- An understanding of the ABKRS feature

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Configure the ABKRS feature to default the payroll area into the organizational assignment infotype

ABKRS Feature

By using the ABKRS feature, you can define default values for the payroll area for your employees.

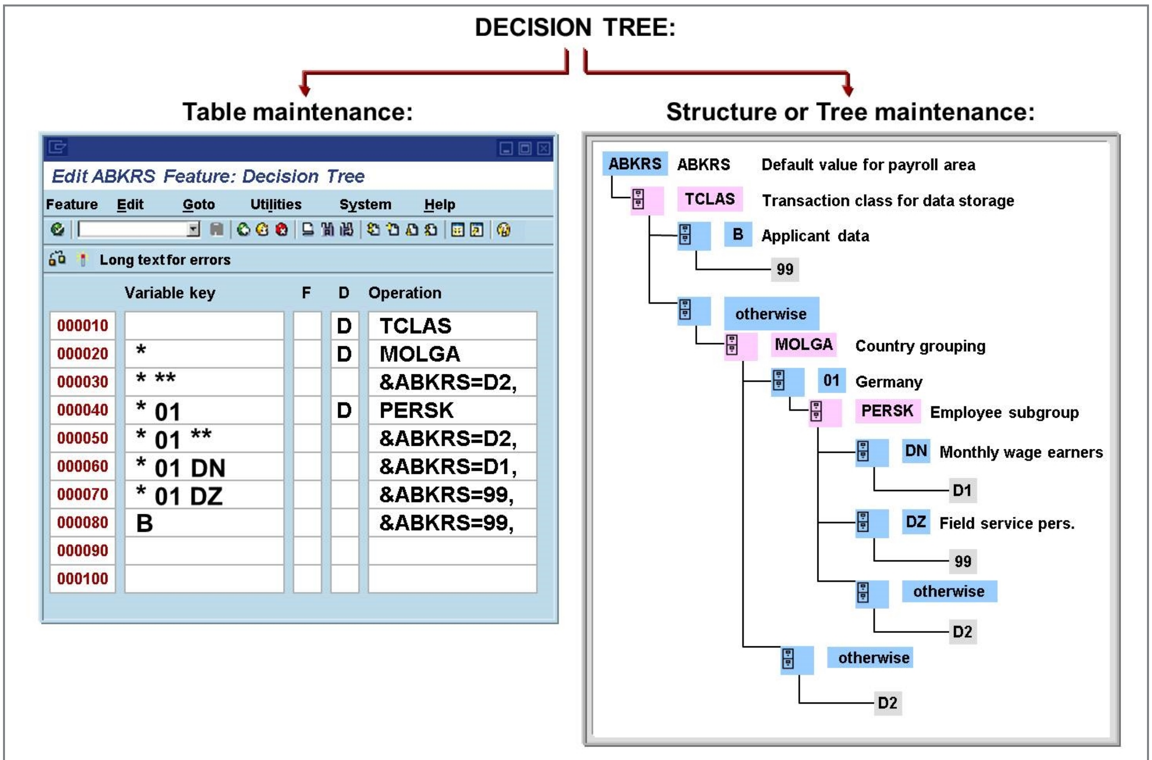


Figure 69: Default Values for Payroll Area

The system proposes the payroll area if you maintain master data in the *Organizational Assignment* infotype (0001).

In the standard SAP system, the payroll area depends on the following data:

- Country grouping
- Employee group
- Employee subgroup

The system stores this data combination as a feature that depicts a rule in a decision tree.

The system arranges the decision rule in the feature according to the following organizational data:

- Transaction class (TCLAS)
- Country grouping (MOLGA)
- Employee subgroup (PERSK)

For example, the payroll area 99 is proposed for the employee subgroup DZ and employees who belong to the country grouping 01 (Germany) . Therefore, all employees who belong to Germany and have the employee subgroup DZ have the default value 99 in the payroll area in the *Organizational Assignment* infotype.

> Note:
> Transaction classes A and B are assigned to administration and recruitment, respectively.

LESSON SUMMARY

You should now be able to:

- Configure the ABKRS feature to default the payroll area into the organizational assignment infotype

Defaulting Personnel Number Ranges

LESSON OVERVIEW

This lesson explains the feature NUMKR (Number Range Intervals) that defines the number range intervals for employees.

Business Example

As an HR administrator you are responsible for the assignment of personnel numbers to new employees. These personnel numbers are based on predefned intervals and should be assigned by default. For this reason, you require the following knowledge:

- An understanding of feature NUMKR

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Set up the NUMKR system feature

NUMKR Feature

You can use the NUMKR feature to assign personnel numbers that are based on the organizational assignment.

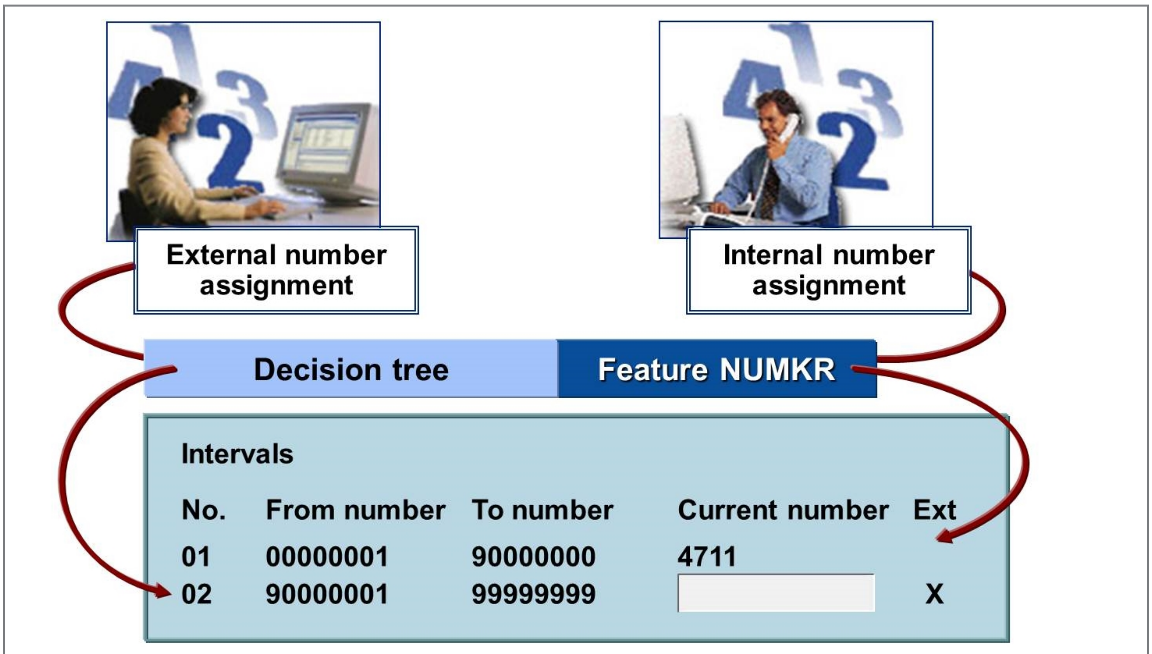


Figure 70: Default for Number Range Intervals

You can assign a number range in the following ways:

Internal number assignment:

In case of internal number assignment, the SAP system assigns the personnel numbers.

External number assignment:

In case of external number assignment, the user assigns the personnel numbers.

SAP recommends that you use the internal number assignment function for the following reasons:

- Matchcodes can use any criteria to search HR master records, and for this reason you do not need "meaningful" personnel numbers.
- When you transfer or promote employees, any "meaning" you may have assigned to a personnel number cannot be lost.

You can have several number range intervals.

LESSON SUMMARY

You should now be able to:

- Set up the NUMKR system feature

Unit 7
Lesson 4

Defaulting the Administrator Group

LESSON OVERVIEW

This lesson explains the feature PINCH that is used to determine an administrator group.

Business Example

As the HR administrator, you are responsible for setting an administrator group which should default into the organizational assignment infotype (IT0001). For this reason, you require the following knowledge:

- An understanding of the feature PINCH which defaults the administrator group

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Update the system feature PINCH to default the administrator group into the organizational assignment infotype (IT0001)

PINCH Feature

The PINCH feature determines an administrator group that is stored in the *Organizational Assignment* infotype.

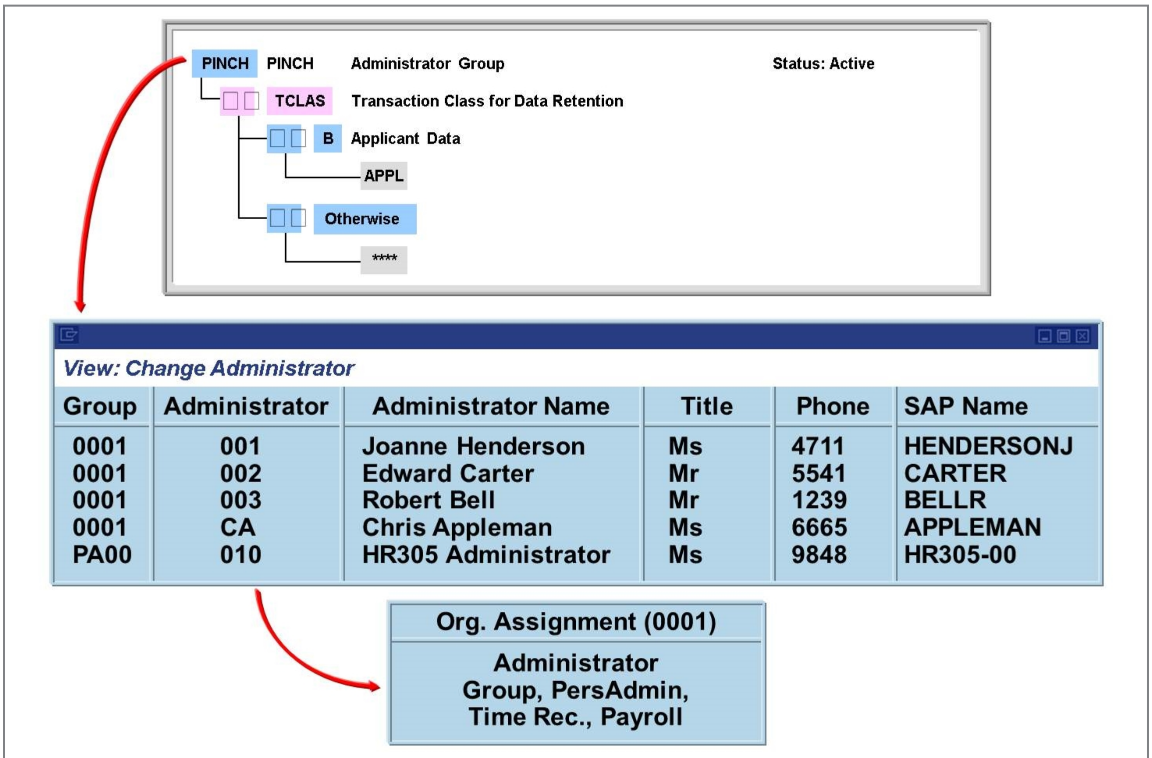


Figure 71: Default for Administrator Groups

You can assign administrators to an administrator group by doing the following steps:

- Store the return code of the feature in the Group field.
- Assign a three-character ID to each administrator.
- Determine the administrator’s name, form of address, telephone number, and user name (SAP User name of the administrator).

If the return value of the *PINCH* feature is four asterisks (****), the system uses the name of the personnel area to which the employee is assigned in the *Organizational Assignment* infotype (0001) as the name of the administrator group.

You can select the administrators stored in the system that belong to the default administrator group. To do so, you can choose F4 help in the relevant field in the *Organizational Assignment* infotype.

LESSON SUMMARY

You should now be able to:

- Update the system feature PINCH to default the administrator group into the organizational assignment infotype (IT0001)

Unit 7

Learning Assessment

1. Features default certain values in the infotype fields.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. The complexity of the decision trees depends on number of decision fields for determining the default value.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

3. Which of the following features determines default values for the payroll area by using data available in the employee's *Organizational Assignment* infotype record?

   Choose the correct answer.

   - [ ] A ABKRS
   - [ ] B PINCH
   - [ ] C NUMKR

4. Which of the following sub-objects appear on the *Features: Initial Screen* ?

   Choose the correct answers.

   - [ ] A Decision tree
   - [ ] B Attributes
   - [ ] C Payroll
   - [ ] D Documentation

5. In the standard SAP system, the payroll area depends on the following data:

   Choose the correct answers.

   - [ ] A Country grouping
   - [ ] B Personal data
   - [ ] C Employee group
   - [ ] D Employee subgroup

6. You can use the NUMKR feature to default personnel numbers.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

7. In case of internal number assignment, the user assigns the personnel numbers.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

8. A three-character ID is required to assign an administrator to an administrator group.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

9. Which system command helps a user find administrators assigned to the default administrator group.

   Choose the correct answer.

   - [ ] A F5 key
   - [ ] B F7 key
   - [ ] C F4 key
   - [ ] D F11 key

Learning Assessment - Answers

1. Features default certain values in the infotype fields.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

2. The complexity of the decision trees depends on number of decision fields for determining the default value.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

3. Which of the following features determines default values for the payroll area by using data available in the employee's *Organizational Assignment* infotype record?

   Choose the correct answer.

   [X] A ABKRS

   [ ] B PINCH

   [ ] C NUMKR

4. Which of the following sub-objects appear on the *Features: Initial Screen* ?

   Choose the correct answers.

   [X] A Decision tree

   [X] B Attributes

   [ ] C Payroll

   [X] D Documentation

5. In the standard SAP system, the payroll area depends on the following data:

   Choose the correct answers.

   - [x] A Country grouping
   - [ ] B Personal data
   - [x] C Employee group
   - [x] D Employee subgroup

6. You can use the NUMKR feature to default personnel numbers.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

7. In case of internal number assignment, the user assigns the personnel numbers.

   Determine whether this statement is true or false.

   - [ ] True
   - [x] False

8. A three-character ID is required to assign an administrator to an administrator group.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

9. Which system command helps a user find administrators assigned to the default administrator group.

   Choose the correct answer.

   - [ ] A F5 key
   - [ ] B F7 key
   - [x] C F4 key
   - [ ] D F11 key

UNIT 8 Personal Data

UNIT OBJECTIVES

- Update master data infotypes used in employee records

Unit 8
Lesson 1

Maintaining Personal Data

LESSON OVERVIEW

This lesson shows you how to update Master Data infotypes used in employee records.

Business Example

While working in the HCM module of SAP, you are responsible for updating Master Data infotypes used in employee records. For this reason, you require the following knowledge:

- An understanding of the employee's Personal Data infotype
- An understanding of the Addresses infotype
- An understanding of the Bank Details infotype

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Update master data infotypes used in employee records

Personal Data

As a personnel administrator working on the HCM module of SAP, you need to enter the personal data of all employees in the system. This data is recorded for administrative, time recording and payroll purposes in HR.

An employee's personal data is stored in pre-defined infotypes.

Company-specific information of employees such as location, department, division, and employee category can be configured in the Customizing tables. These tables are grouped in the implementation guide (IMG) where you configure company-specific information.

Examples of infotypes on which employee data is stored include the following:

- *Personal Data*
- *Addresses*
- *Bank Details*

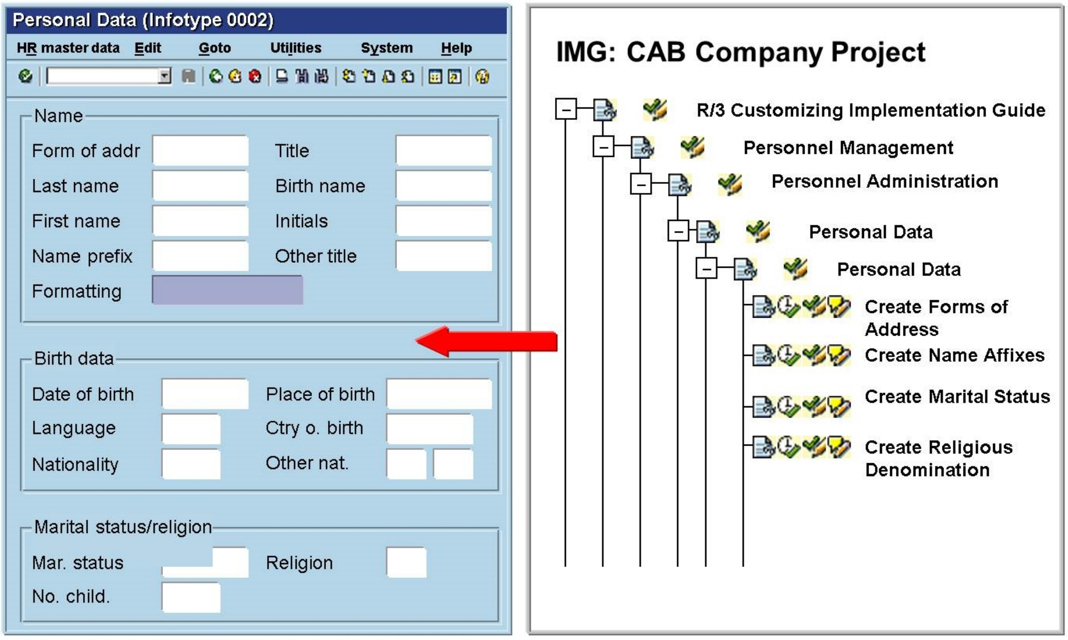


Figure 72: Personal Data

On the *Personal Data (Infotype 0002)* screen, within the *Name* data group, enter all the data related to the employee's name.

The Name data group includes the following details:

- The form of address
- The last and first names of the employee
- Any second names or birth names
- The title and initials

In this data group, you need to enter details of any academic titles, prefixes, and affixes that the employee may have.

In the *Birth data* data group, enter the employee's date and place of birth, including the nationality and language.

In the *Marital status / religion* data group, you can enter data such as the marital status, number of children, and (in some countries) religion of the employee.

Note:
Since you do not have to enter the employee's family members, the system does not check whether the number of children entered in the *Personal Data* infotype is the same as that entered in the *Family* infotype (0021).

Addresses

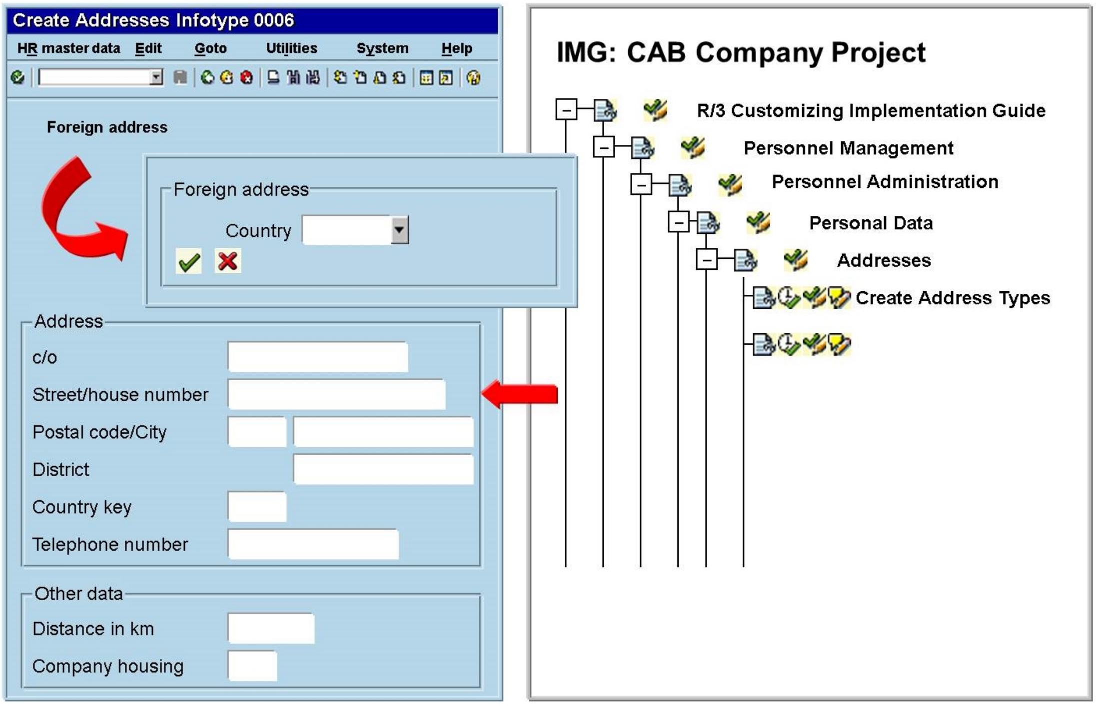


Figure 73: Addresses

The *Addresses* infotype includes the address details of an employee.

For the *Addresses infotype (0006)* , each country has its own version of entry screens. When you create an address, the system chooses the entry screen that corresponds to the country of the personnel area to which the employee is assigned in the *Organizational Assignment infotype (0001)* . This personnel area is assigned to a company code (created in Accounting) and the country grouping.

If you want to use a country screen different from the one proposed by the system, use the *Foreign address* pushbutton to choose a different screen. This pushbutton is located on the entry screen of the *Create Addresses Infotype 0006* screen.

Bank Details

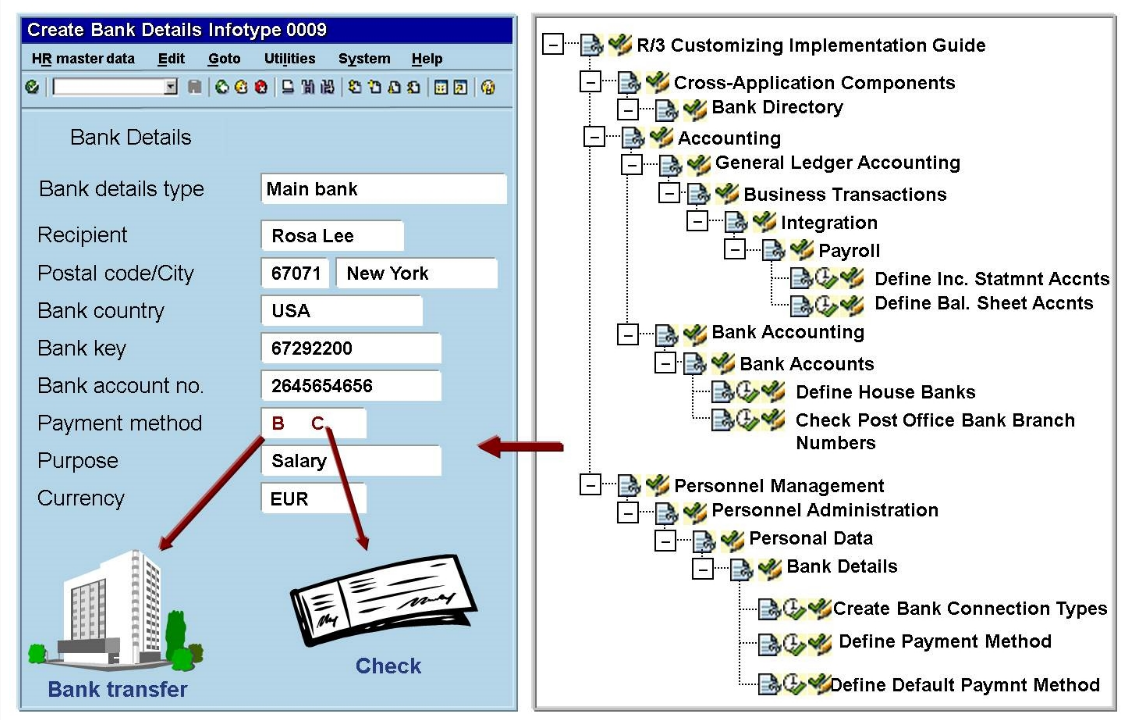


Figure 74: Bank Details

The *Bank Details* infotype helps you enter employee's bank data.

On this screen, you enter the following bank details of an employee:

- Bank Details Type (for example: main bank, other bank)
- City and country where the bank is located
- Bank key and account number
- Payment method and currency

LESSON SUMMARY

You should now be able to:

- Update master data infotypes used in employee records

Learning Assessment

1. The employee's Personal information is stored in which of the following infotypes?

   Choose the correct answers.

   - [ ] A Personal Data
   - [ ] B Personnel administration
   - [ ] C Addresses
   - [ ] D Bank Details

2. The *Personal Data* infotype includes which of the following details of an employee?

   Choose the correct answers.

   - [ ] A Employee name
   - [ ] B Date of birth
   - [ ] C Address
   - [ ] D Marital status

3. For the *Addresses* infotype (0006), each country has its own version of entry screen.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

4. The *Bank Details* infotype helps you enter which of the following details?

   Choose the correct answers.

   - [ ] A Country key
   - [ ] B Foreign address
   - [ ] C Account number
   - [ ] D Bank Key

Learning Assessment - Answers

1. The employee's Personal information is stored in which of the following infotypes?

   Choose the correct answers.

   - [X] A Personal Data
   - [ ] B Personnel administration
   - [X] C Addresses
   - [X] D Bank Details

2. The *Personal Data* infotype includes which of the following details of an employee?

   Choose the correct answers.

   - [X] A Employee name
   - [X] B Date of birth
   - [ ] C Address
   - [X] D Marital status

3. For the *Addresses* infotype (0006), each country has its own version of entry screen.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

4. The *Bank Details* infotype helps you enter which of the following details?

   Choose the correct answers.

   - [ ] A Country key
   - [ ] B Foreign address
   - [X] C Account number
   - [X] D Bank Key

UNIT 9 Data Consistency Maintenance

UNIT OBJECTIVES

- Maintain data consistency between basic pay and planned working time infotypes

Unit 9
Lesson 1

Linking Planned Working Time and Basic Pay

LESSON OVERVIEW

This lesson shows you how to maintain data consistency between basic pay and planned working time infotypes.

Business Example

While you work in the HCM module of SAP, you are responsible for maintaining data consistency between basic pay and planned working time infotypes. For this reason, you require the following knowledge:

- An understanding of the employee's working time
- An understanding of the links between planned working time and basic pay
- An understanding of the Employee subgroup grouping for the personnel calculation rule

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Maintain data consistency between basic pay and planned working time infotypes

Employee Working Time

All employees within a company have specific working times. Based on these working times, you can calculate the attendance and absence of employees.

Working times also play an important role in deciding an employee's pay.

An employee can be paid in the following ways:

- On an hourly basis
- For a specified period (for example, a month)

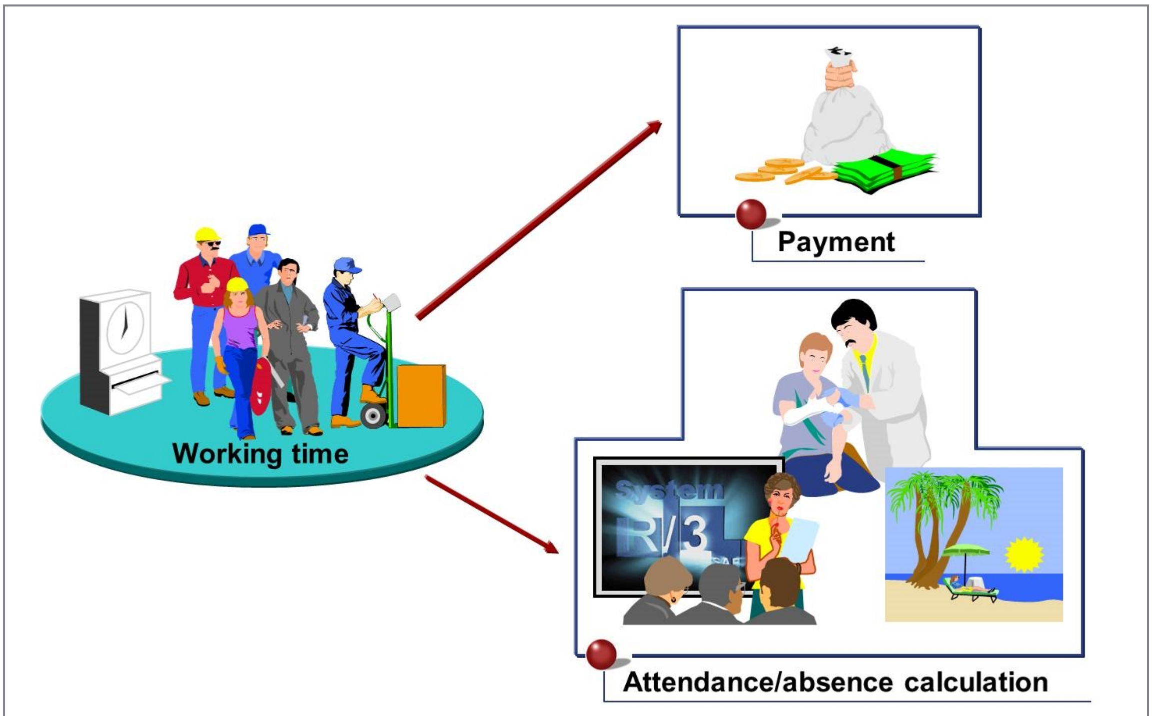


Figure 75: Employee Working Time

You assign a work schedule to each employee. The working time stored within this work schedule is important for calculating the employee's pay, as well as for counting the employee's attendance and absences.

To calculate an employee's pay, you first record the working time information in the *Planned Working Time* and *Basic Pay* infotypes. Once this information is recorded, it can be accessed through the attendance/absence calculation function and payroll.

Planned Working Time

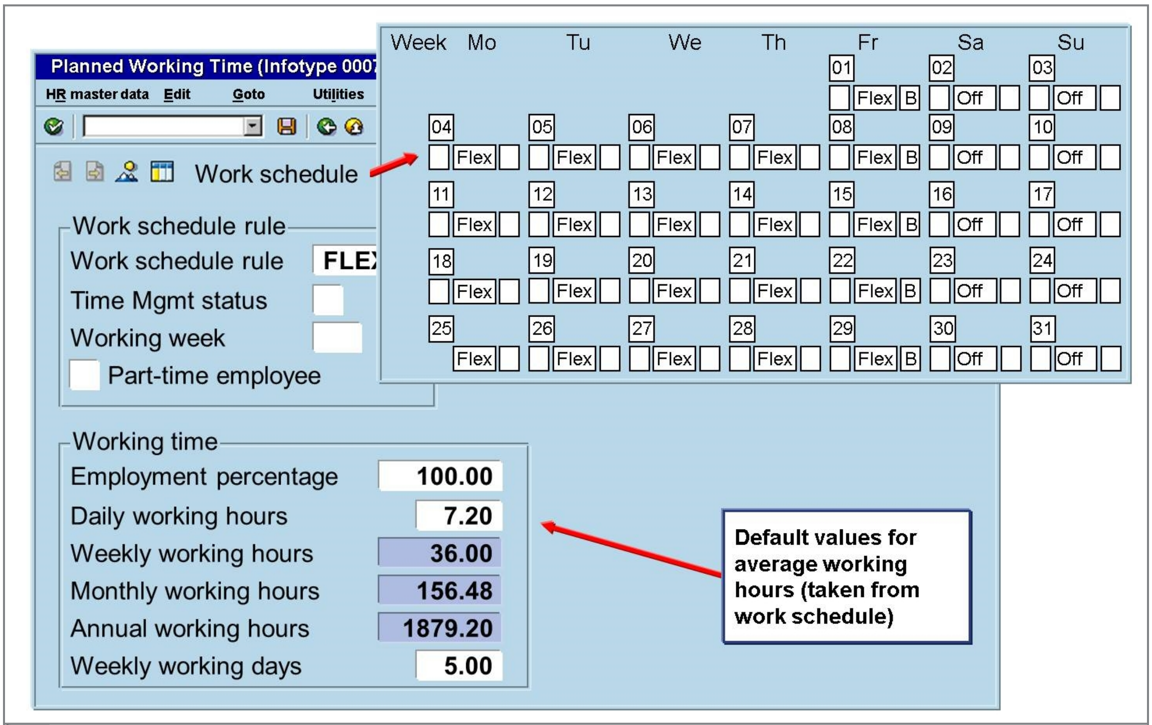


Figure 76: Planned Working Time

The system stores an employee's working time as a work schedule rule in the *Planned Working Time* infotype (0007). The system also stores the average working hours here. The Monthly working hours field contains the total planned working time for the current month.

Links Between Planned Working Time and Basic Pay

When an employee is hired, the average working hours per period in infotype 0007 are carried to infotype 0008 (*Basic Pay*).

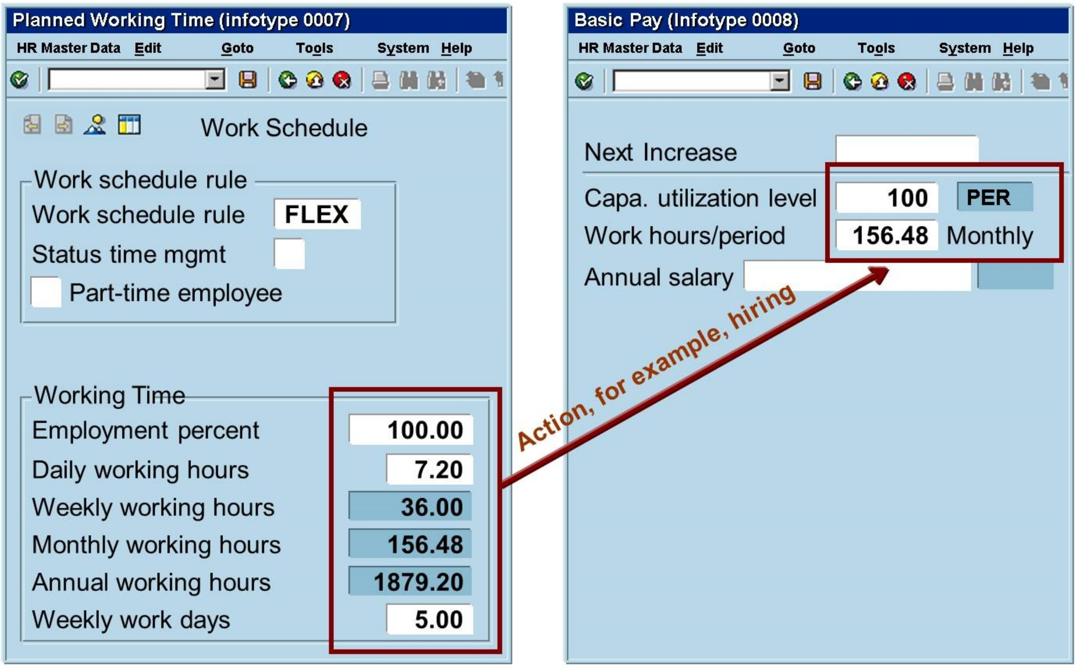


Figure 77: Links Between Planned Working Time and Basic Pay

In the hiring action, the system takes the employment percentage and the average number of working hours from infotype 0007 as default values and passes them on to the capacity utilization level and the working hours per period in infotype 0008.

Employee Subgroup Grouping for the Personnel Calculation Rule

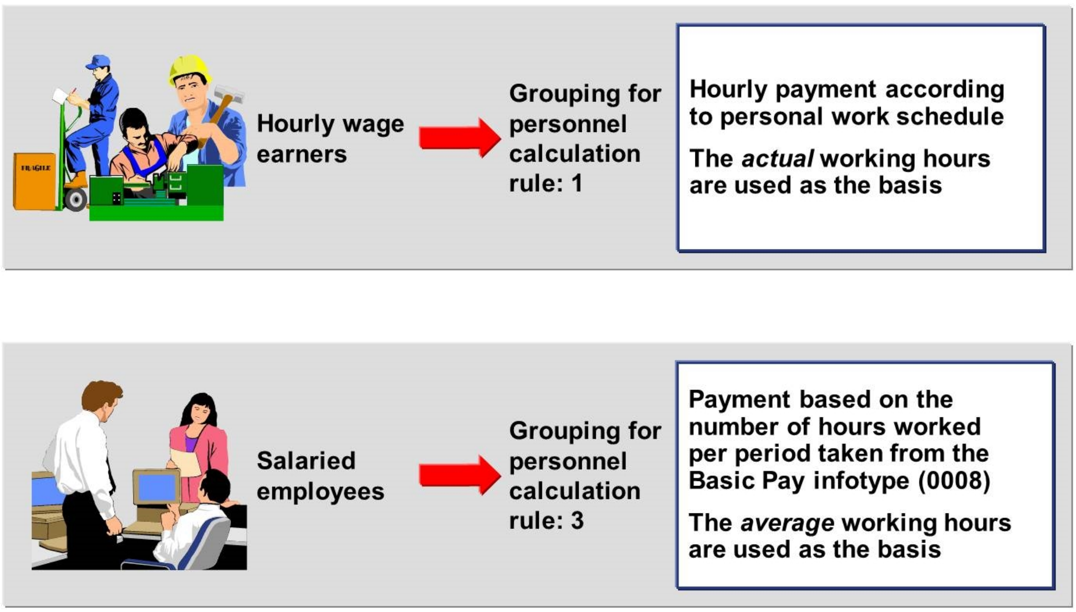


Figure 78: Employee Subgroup Grouping for Personnel Calculation Rule

In the SAP system, a clear distinction is made between the following employees:

- Employees who are paid on an hourly basis

- Employees whose pay is based on the number of hours they work per period (for example, per month)

To realize this difference in the system, you set up employee subgroup groupings for personnel calculation rules, so that the system treats the various employee subgroups differently in payroll.

> Note:
> The personnel calculation rule is a part of the payroll program. It divides the salary of an employee by the number of working hours for monthly-salaried employees. For hourly wage earners, the rule does not divide the salary by the number of working hours because their salary is based on an hourly rate.

The definition of the employee subgroup groupings is fixed and cannot be deleted. For example, it is 1 for hourly wage earners and 3 for salaried employees.

Calculating Overtime Rate for a Salaried Employee

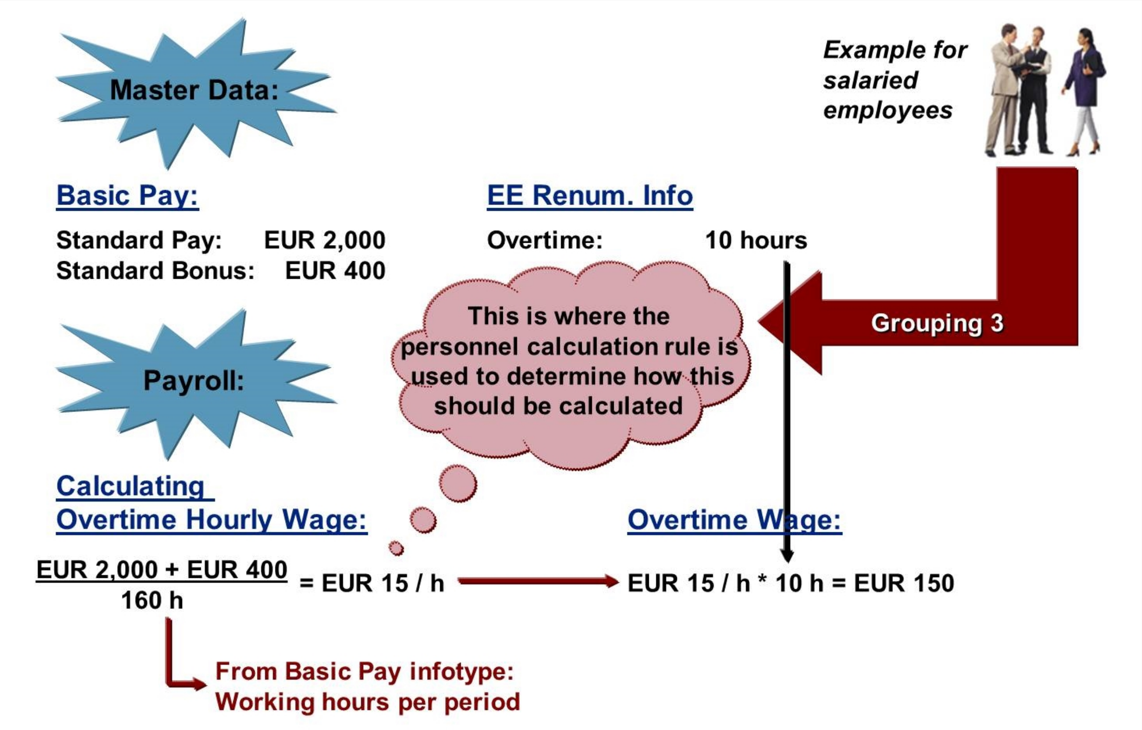


Figure 79: Calculation Example 1: Calculating Overtime Rate for a Salaried Employee

The figure Calculation Example 1: Calculating Overtime Rate for a Salaried Employee is an example of how a personnel calculation rule works for a salaried employee.

Calculating Overtime Rate for an Hourly Wage Earner

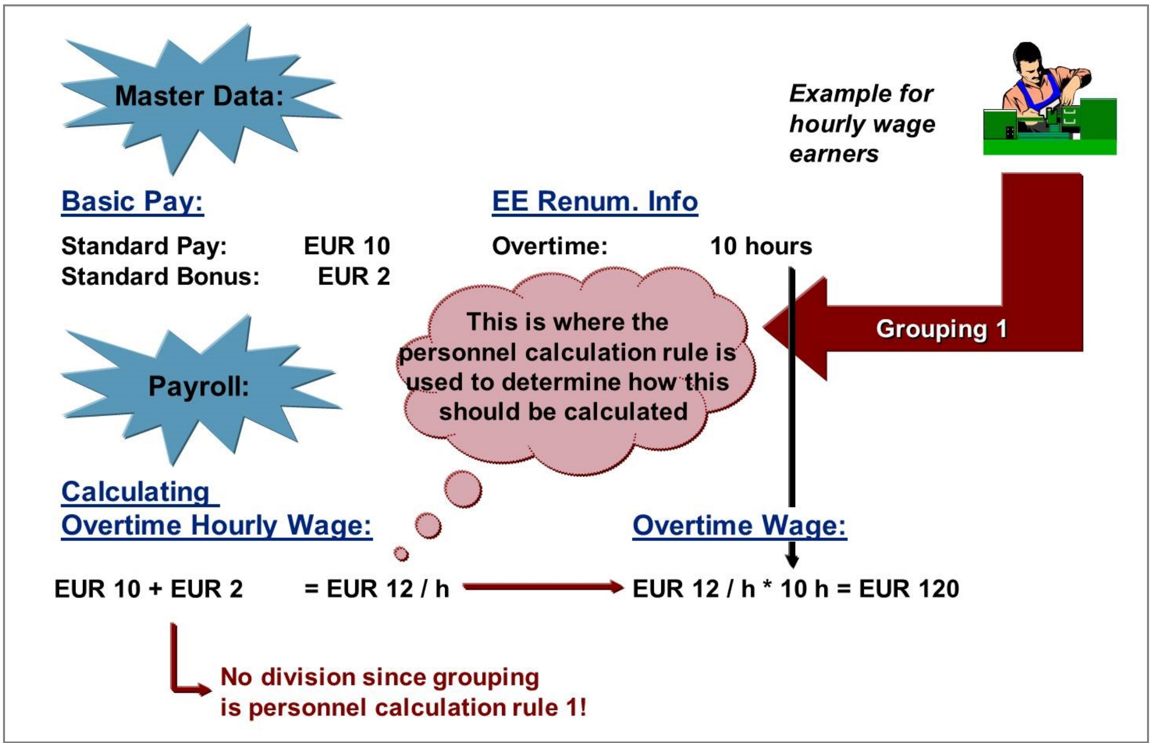


Figure 80: Calculation Example 2: Calculating the Overtime Rate for an Hourly Wage Earner

The figure Calculation Example 2: Calculating the Overtime Rate for an Hourly Wage Earner is an example of how a personnel calculation rule works for an hourly wage earner.

The system uses the same personnel calculation rule to determine an overtime rate for an hourly wage earner. However, as a result of the employee subgroup grouping for the personnel calculation rule (which is 1 for an hourly wage earner), the working hours may not be divided per period.

LESSON SUMMARY

You should now be able to:

- Maintain data consistency between basic pay and planned working time infotypes

Learning Assessment

1. Based on the working time of an employee, you can calculate which of the following information about an employee?

   Choose the correct answers.

   - [ ] A Attendance
   - [ ] B Absence
   - [ ] C Pay

2. In the hiring action, the system takes which of the following data from *Create Planned Working Time* as default values?

   Choose the correct answers.

   - [ ] A Employment percentage
   - [ ] B Work schedule
   - [ ] C Average number of working hours
   - [ ] D Weekly work days

3. In the hiring action, the system takes the employment percentage and the average number of working hours from infotype 0008 as default values and passes them on to the *Capacity utilization level and Working hrs/period* in infotype 0007.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

4. The definition of the employee subgroup groupings is fixed and cannot be deleted.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. Based on the working time of an employee, you can calculate which of the following information about an employee?

   Choose the correct answers.

   - [X] A Attendance
   - [X] B Absence
   - [X] C Pay

2. In the hiring action, the system takes which of the following data from *Create Planned Working Time* as default values?

   Choose the correct answers.

   - [X] A Employment percentage
   - [ ] B Work schedule
   - [X] C Average number of working hours
   - [ ] D Weekly work days

3. In the hiring action, the system takes the employment percentage and the average number of working hours from infotype 0008 as default values and passes them on to the *Capacity utilization level and Working hrs/period* in infotype 0007.

   Determine whether this statement is true or false.

   - [ ] True
   - [X] False

4. The definition of the employee subgroup groupings is fixed and cannot be deleted.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

UNIT 10 Remuneration Structure

UNIT OBJECTIVES

- Identify the remuneration structure
- Maintain pay scales to manage employee remuneration
- Configure the pay scale table for employee remuneration
- Control the setup and default values of pay scale structures

Building the Remuneration Structure

LESSON OVERVIEW

This lesson explains what remuneration types are and how to manage the pay scale structure. The lesson also explains the grouping of employee subgroups for collective agreement provisions.

Business Example

As a personnel administrator, you are responsible for the employee remuneration structure. For this reason, you require the following knowledge:

- An understanding of remuneration types, salary and pay scales
- An understanding of the pay scale structure
- An understanding of employee subgroups for collective agreement provisions

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Identify the remuneration structure

Remuneration Types

SAP distinguishes between the two remuneration types, pay scale and salary.

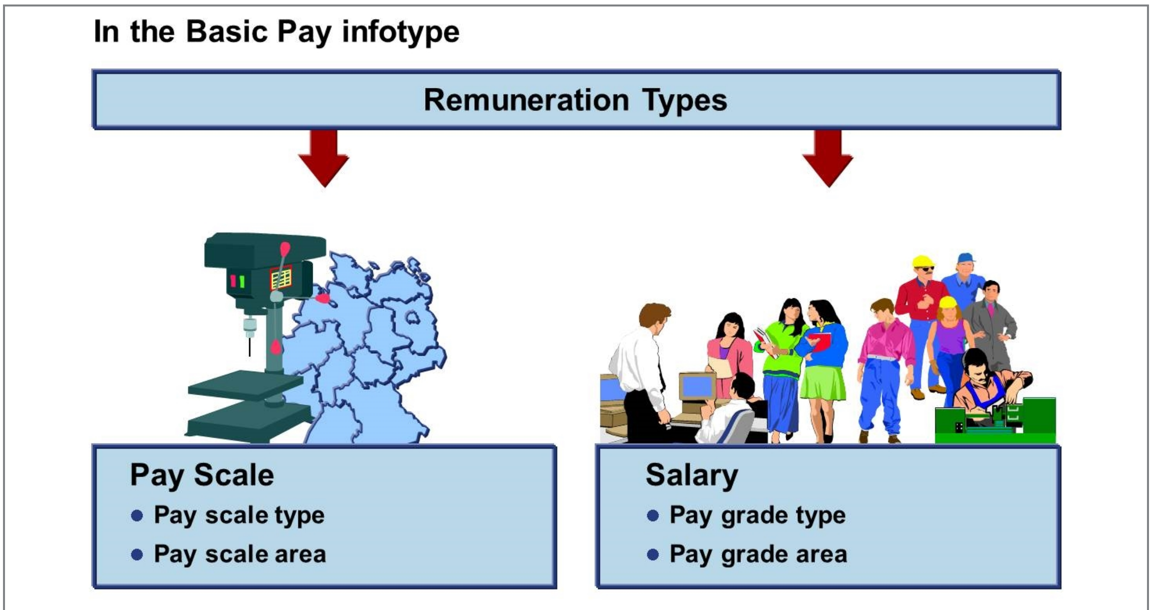


Figure 81: Remuneration Types

In the *Basic Pay* infotype, you can set the remuneration type to *pay scale* or *salary* using the *Change Remuneration Type* option in the Edit menu.

To evaluate wage types indirectly, you must build a pay scale structure (Table T510). This is because the system also uses this pay scale structure to evaluate wage types indirectly if you use a salary structure.

> Note:
> If you want to use a salary structure, refer to the courses on Compensation Management.

Pay Scale Structure

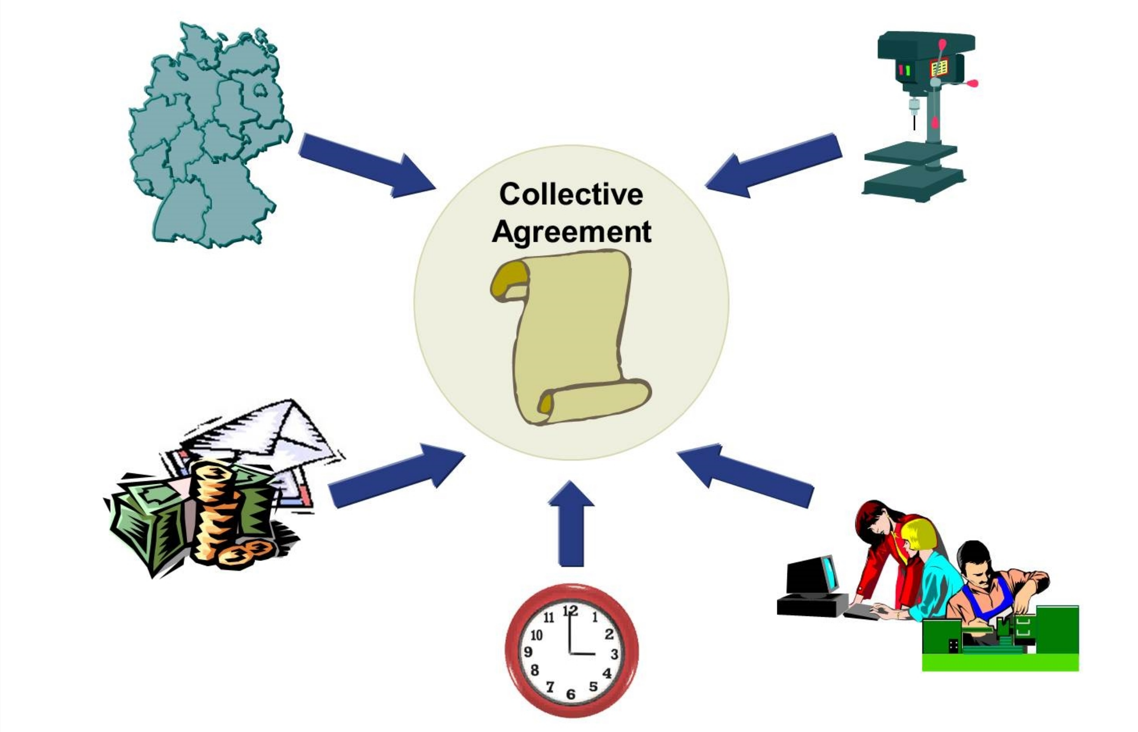


Figure 82: Pay Scale Structure

The pay scale structure includes information on regional or geographic aspects as well as data on specific industries, times, and finances. However, you still need to take account of the differences between pay scale employees and salaried employees.

You assign an employee to a remuneration structure when you create the basic pay in the *Basic Pay* infotype (0008).

Pay Scale Data Stored in Basic Pay

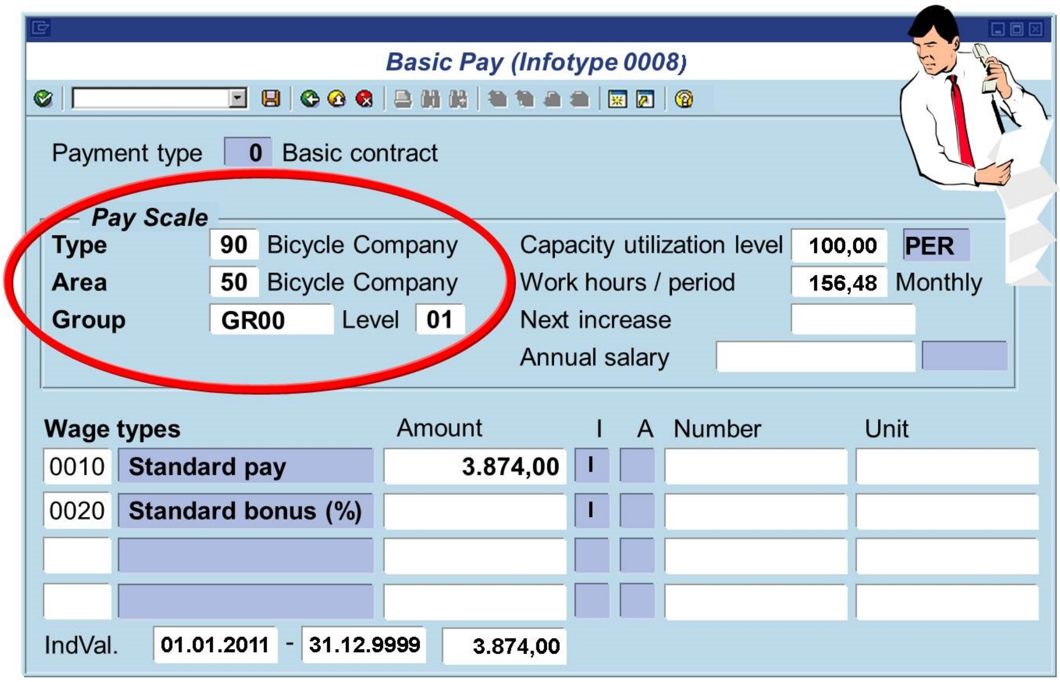


Figure 83: Pay Scale Data Stored in Basic Pay

Then, you store an employee's pay scale data in the *Basic Pay* infotype (0008).

Even if you do not have collective agreement provisions at your company and employees negotiate their pay when you hire them, you still have to define fields in the Basic Pay infotype.

Following fields are defined in the Basic Pay infotype:

- A pay scale type and a pay scale area
- An employee grouping for collective agreement provisions
- A pay scale group

Since these fields are required entry fields in infotype 0008, you have to make at least one entry in the relevant table.

In your company, the employee's pay is regulated by a number of collective agreement provisions. The differences in pay among employees are based on location or pay scale areas. The collective agreement provisions determine how much you pay the employees.

Mapping Pay Scale Data in the SAP System

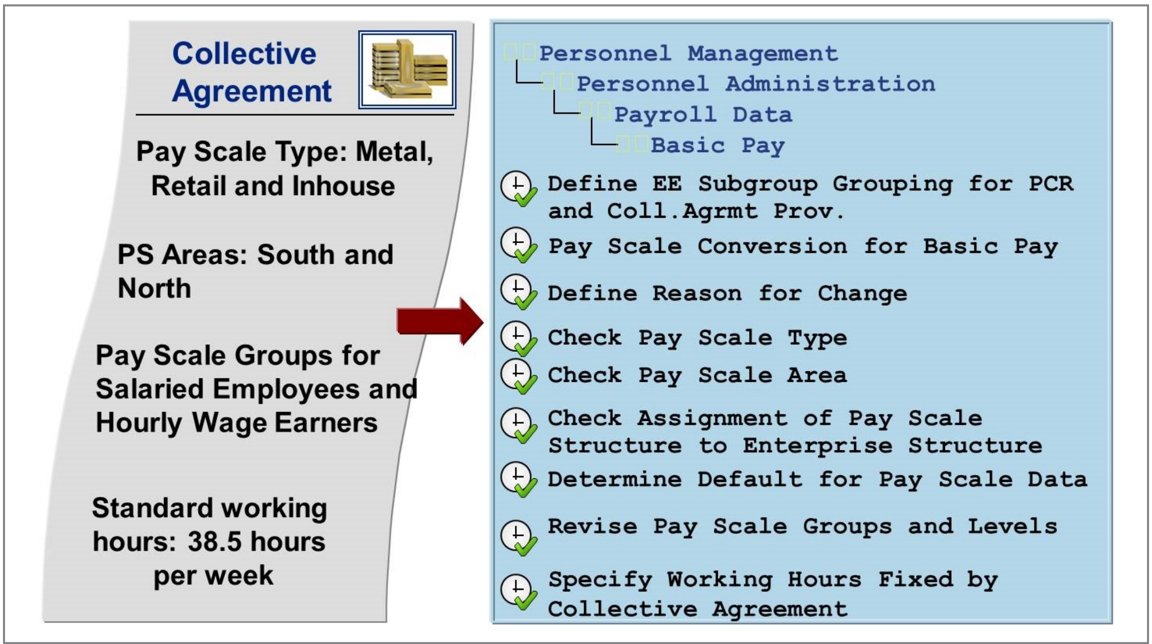


Figure 84: Mapping Pay Scale Data in the SAP System

You use the pay scale groups and pay scale levels to map the different payments in the system. The IMG steps for setting up the remuneration structure in the SAP system appear on the right side of the figure.

Employee Subgroups for Collective Agreement

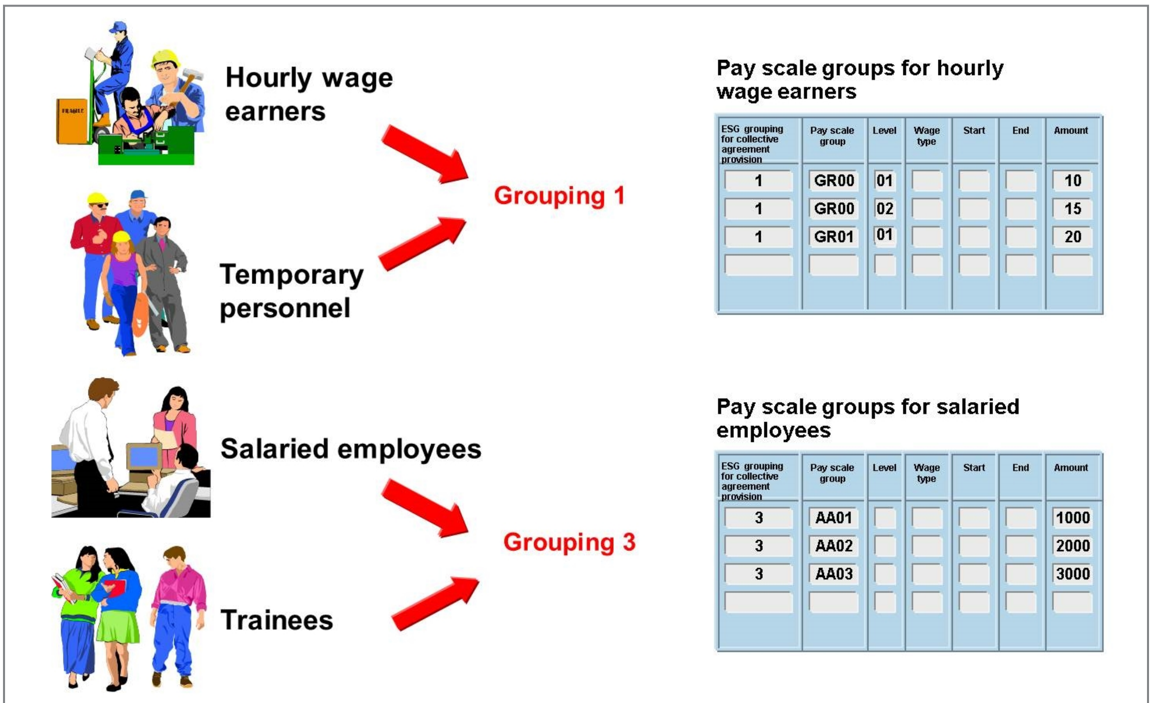


Figure 85: Grouping Employee Subgroups for Collective Agreement

The grouping of employee subgroups for collective agreement provisions allows you to assign different employees to different pay scale groups. You can use the Customizing functions to group employee subgroups.

The SAP system contains the following standard groupings:

- Pay scale employee / hourly wage -> Indicator 1
- Pay scale employee / monthly wage -> Indicator 2
- Salaried employee -> Indicator 3
- Non-pay scale employee -> Indicator 4
- Civil servant -> Indicator 5

The most important function of the employee subgroup grouping for collective agreement provisions is to define pay scale groups and pay scale levels within the grouping for each pay scale type and pay scale area.

LESSON SUMMARY

You should now be able to:

- Identify the remuneration structure

Unit 10
Lesson 2

Creating and Assigning a Pay Scale

LESSON OVERVIEW
This lesson shows you how to create and assign a pay scale type and a pay scale area to an employee record.

Business Example

As a personnel administrator, you are responsible for remuneration and need to create a new pay scale type and pay scale area. For this reason, you require the following knowledge:

- An understanding of pay scale types and pay scale areas

LESSON OBJECTIVES
After completing this lesson, you will be able to:

- Maintain pay scales to manage employee remuneration

Pay Scale Type and Pay Scale Area

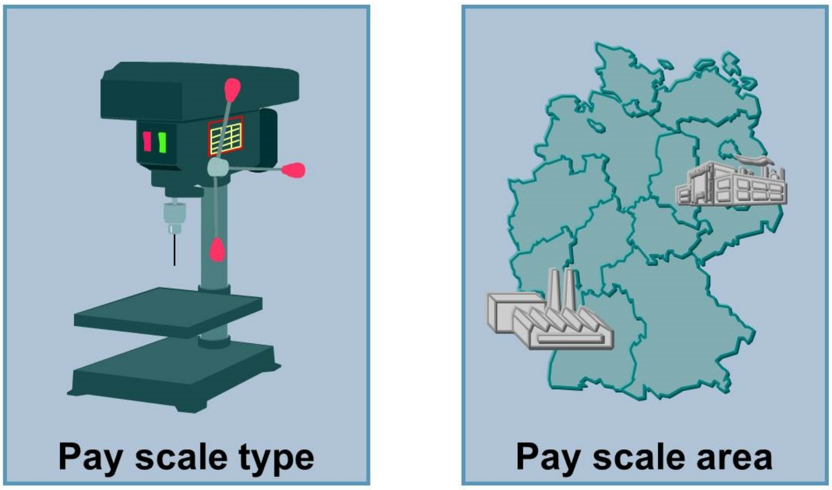


Figure 86: Defining Pay Scale Type and Pay Scale Area

Pay Scale Type

In the SAP system, pay scale types are two-character keys defined for each region. You can maintain pay scale types in Customizing.

Pay Scale Area

The pay scale area represents the geographical region to which a pay scale or a collective agreement applies. In the SAP system, pay scale areas are two-character keys that are defined for each region. You can maintain pay scale areas in Customizing.

LESSON SUMMARY

You should now be able to:

- Maintain pay scales to manage employee remuneration

Unit 10
Lesson 3

Creating a Pay Scale Table

LESSON OVERVIEW

This lesson shows you how to create a pay scale table.

Business Example

As an HR administrator, you are responsible for collective agreement provisions for remuneration structures. You need to create a pay scale table for employee remuneration. For this reason, you require the following knowledge:

- An understanding of how to create a pay scale table

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Configure the pay scale table for employee remuneration

Pay Scale Table

The groupings for **enterprise** and **personnel structure** determine the pay scale groups and levels within which a pay scale table view will appear in infotype 0008.

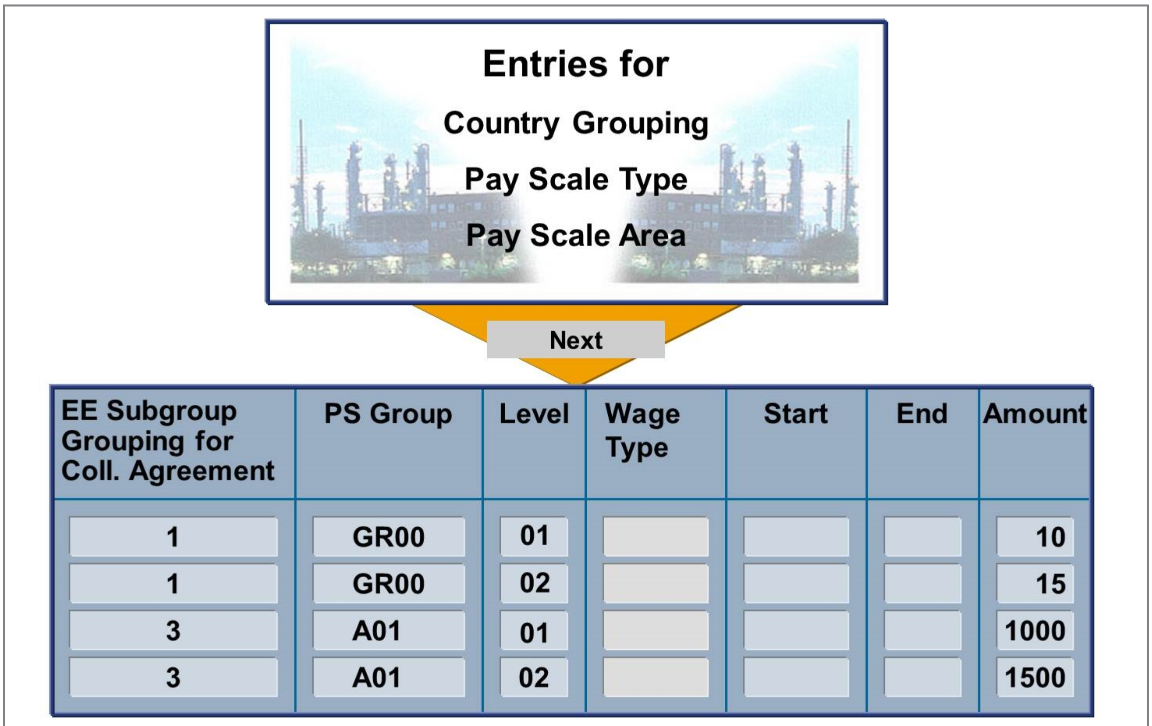


Figure 87: Pay Scale Groups and Pay Scale Levels

You define pay scale groups and levels for each country grouping, pay scale type, pay scale area, and employee subgroup grouping for collective agreement provision.

Pay scale groups are used for scheduling job evaluations and indirect valuations.

Pay scale groups are divided into pay scale levels.

LESSON SUMMARY

You should now be able to:

- Configure the pay scale table for employee remuneration

Defaulting Pay Scale Values

LESSON OVERVIEW

This lesson shows you how to define default values for the pay scale type and pay scale area.

Business Example

Collective agreement provisions for the remuneration structure for an employee are based on pay scale types and pay scale areas. As the HR administrator, you need to ensure default values for the pay scale type and pay scale area are set up. For this reason, you require the following knowledge:

- An understanding of the default values for pay scale types and pay scale areas

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Control the setup and default values of pay scale structures

Default Values for Pay Scale Type and Pay Scale Area

You can assign the pay scale type and the pay scale area to the various personnel subareas using the IMG table Check Assignment of Pay Scale Structure to Enterprise Structure.

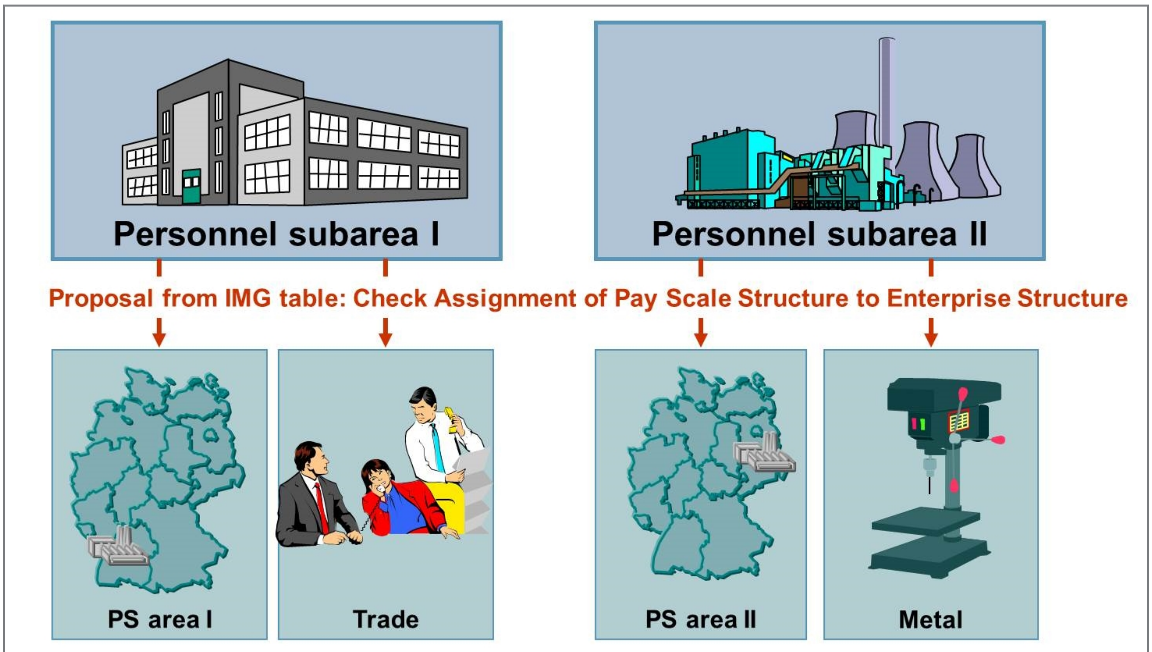


Figure 88: Assigning the Pay Scale Type / Pay Scale Area to a Personnel Subarea

You can define default values using the pay scale type and pay scale area assigned to the personnel subarea, or with a decision rule.

Defining Default Pay Scale Values Using Feature TARIF

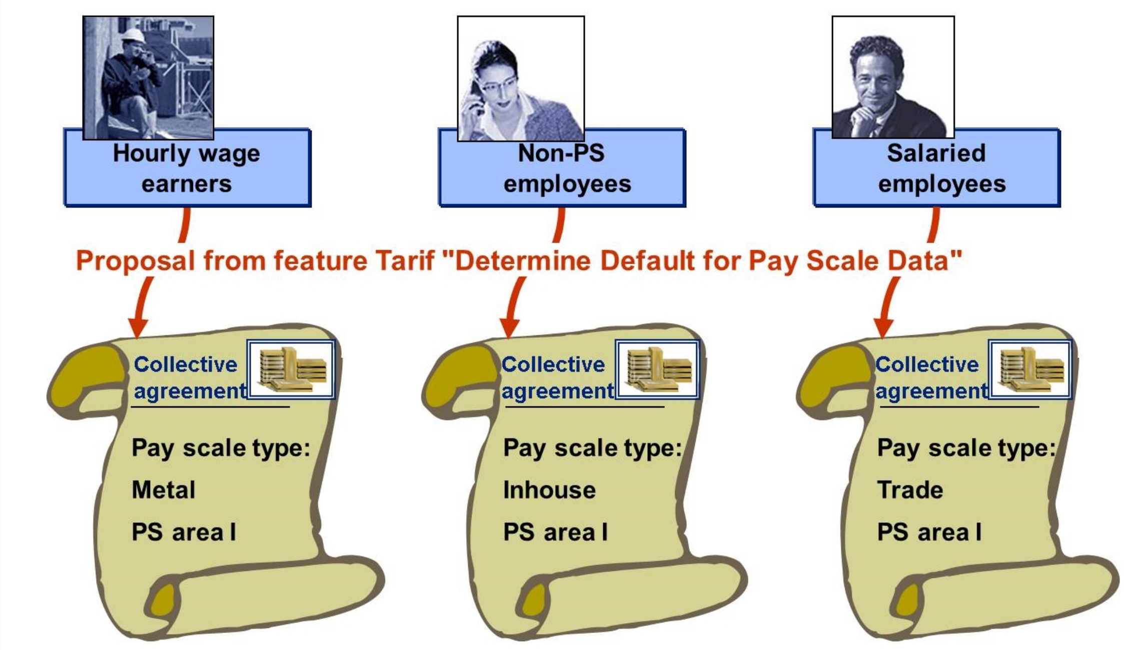


Figure 89: Default Pay Scale Data Using Feature TARIF

You can define default values for different pay scale types and pay scale areas in the *Basic Pay* infotype (0008) dependent on the organizational assignment of the employee, for example by using the feature *TARIF* .

The return value of the feature must have the format: xx/yy/z where:

- xx is the pay scale type
- yy is the pay scale area
- z is optional and describes the type of planned remuneration (*Organizational Management* infotype: 1005).

By specifying the type of planned remuneration, you can record information on salary and remuneration structures. In this way, the system can propose data for the pay scale type and pay scale area depending on the position currently held by the employee.

Note:
If the default values from the Customizing table Check Assignment of Pay Scale Structure to Enterprise Structure and the *TARIF* feature conflict, the value from the feature overrides the value entered in the Customizing table.

LESSON SUMMARY
You should now be able to:

- Control the setup and default values of pay scale structures

Unit 10

Learning Assessment

1. Employee subgroup grouping for collective agreement provisions helps you to map the pay scales applicable to different categories of employees.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. Which of the following are the compulsory fields in infotype 0008?

   Choose the correct answers.

   - [ ] A Pay scale type
   - [ ] B Pay scale area
   - [ ] C Pay scale group
   - [ ] D Pay scale level

3. In the SAP system, pay scale types and pay scale areas are two-character keys.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

4. The pay scale type represents the geographical region to which a collective agreement applies.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

5. Pay scale groups may be divided into:

   Choose the correct answer.

   - [ ] A Pay scale areas
   - [ ] B Pay scale levels
   - [ ] C Pay scale types
   - [ ] D Employee subgroups

6. Which of the following will the *TARIF* feature default in the *basic pay* Infotype (0008)?

   Choose the correct answers.

   - [ ] A Pay scale area
   - [ ] B Pay scale group
   - [ ] C Pay scale level
   - [ ] D Pay scale type

7. In the return value format: xx/yy/z, what does ‘yy’ denote?

   Choose the correct answer.

   - [ ] A Pay scale type
   - [ ] B Pay scale area
   - [ ] C Pay scale level
   - [ ] D Planned remuneration

8. If the default values from the Customizing table conflict with the *TARIF* feature, the value from the Customizing table overrides the value entered in the feature.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. Employee subgroup grouping for collective agreement provisions helps you to map the pay scales applicable to different categories of employees.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

2. Which of the following are the compulsory fields in infotype 0008?

   Choose the correct answers.

   - [X] A Pay scale type
   - [X] B Pay scale area
   - [X] C Pay scale group
   - [ ] D Pay scale level

3. In the SAP system, pay scale types and pay scale areas are two-character keys.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

4. The pay scale type represents the geographical region to which a collective agreement applies.

   Determine whether this statement is true or false.

   - [ ] True
   - [X] False

5. Pay scale groups may be divided into:

   Choose the correct answer.

   - [ ] A Pay scale areas
   - [x] B Pay scale levels
   - [ ] C Pay scale types
   - [ ] D Employee subgroups

6. Which of the following will the *TARIF* feature default in the *basic pay* Infotype (0008)?

   Choose the correct answers.

   - [x] A Pay scale area
   - [ ] B Pay scale group
   - [ ] C Pay scale level
   - [x] D Pay scale type

7. In the return value format: xx/yy/z, what does 'yy' denote?

   Choose the correct answer.

   - [ ] A Pay scale type
   - [x] B Pay scale area
   - [ ] C Pay scale level
   - [ ] D Planned remuneration

8. If the default values from the Customizing table conflict with the *TARIF* feature, the value from the Customizing table overrides the value entered in the feature.

   Determine whether this statement is true or false.

   - [ ] True
   - [x] False

UNIT 11 Wage Type Structure

UNIT OBJECTIVES

- Set up wage types
- Outline wage type configuration tables
- Copy wage types in the wage type catalog
- Maintain the use of wage types by controlling their permissibility
- Identify the characteristics of wage types
- Configure wage types to use pay scale data
- Configure wage types to perform calculations on base amounts
- Outline the configuration of wage types to calculate percentages
- Outline the configuration of wage types to use position data

- Identify additional attributes of indirect valuations
- Configure default values for the basic pay infotypee

Unit 11
Lesson 1

Setting Up Wage Types

LESSON OVERVIEW
This lesson shows you how to set up a wage type structure according to company-specific requirements.

Business Example

You need to manage payroll processing and wage type structures in the SAP system. To do this, you need to create and manage wage type structures. For this reason, you require the following knowledge:

- An understanding of different wage types
- An understanding of how to identify and customize a wage type structure according to meet your organizational requirements

LESSON OBJECTIVES
After completing this lesson, you will be able to:

- Set up wage types

Wage Types

Wage types are the key elements in the wage type structure, and are the most important concepts in Human Resources.

In the SAP system, you need wage types to pay employees.

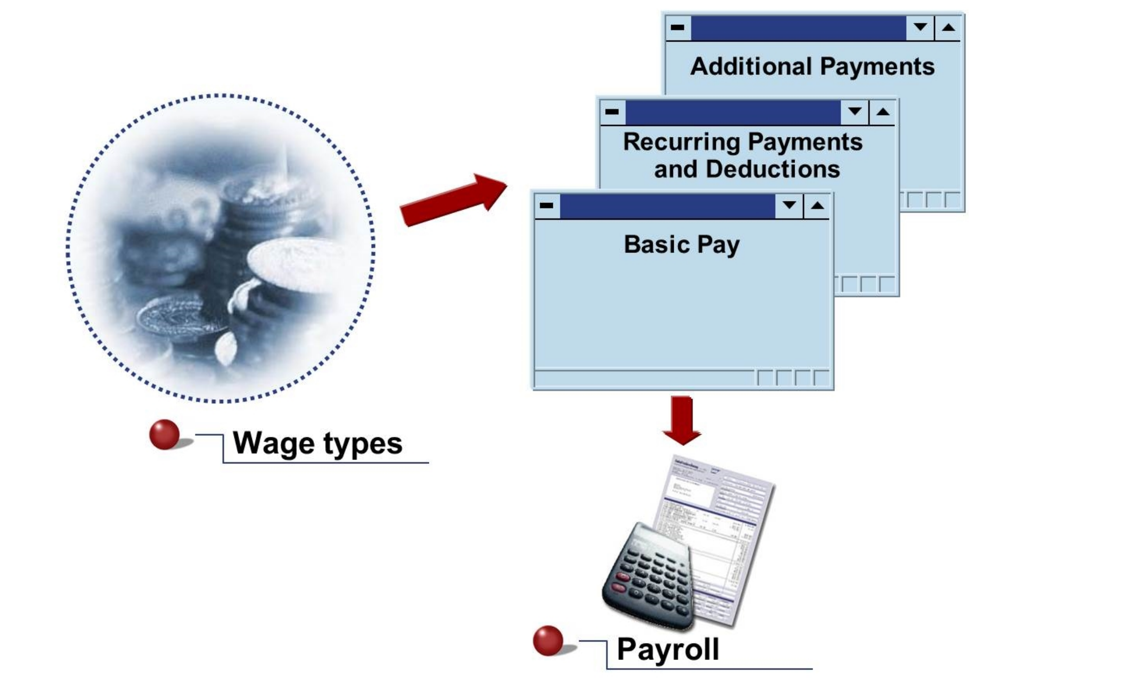


Figure 90: Employees' Payments and Deductions

You use wage types to assign payments and deductions as well as to control the payroll program. To distinguish between individual wage types, you use wage characteristics. In the SAP system, there are two main categories of wage types.

Main categories of wage types are as follows:

Primary or dialog wage types:
: Each individual company defines the primary or dialog wage types to depict the company's specific payroll requirements. The SAP system contains examples of primary or dialog wage types in a sample wage type catalog. For example, MA10 is used for standard pay. The characteristics are generally pre-defined for model wage types.

Secondary or technical wage types:
: The standard system also contains secondary or technical wage types. You can recognize these as they have a slash "/" as the first character. Wage type characteristics have not been defined for technical wage types as the system defines their value during payroll processing. Technical wage types are not part of the employee's master data.

To Set up Wage Types

The process of setting up wage types involves the following three steps:

1. Implementing dialog characteristics: Dialog characteristics are about behavior of wage types when they are entered into infotypes, and allow you to make modifications as per customer-specific requirements. Dialog characteristics also act as a differentiator between primary and secondary wage types.

2. Valuating wage types: Wage type valuation is used for processing in payroll. Like dialog characteristics, wage type valuation also allows you to carry out modifications as per the customer-specific requirements.

3. Processing payroll: Wage types in payroll are processed according to a set of rules assigned to the wage type valuation. The payroll driver is programmed to process the wage type based on the characteristics assigned to it.

You can customize and categorize various wage structures according to your requirements.

Wage Type Groups

The wage type group concept is used to group wage types that have similar characteristics with regard to payroll.

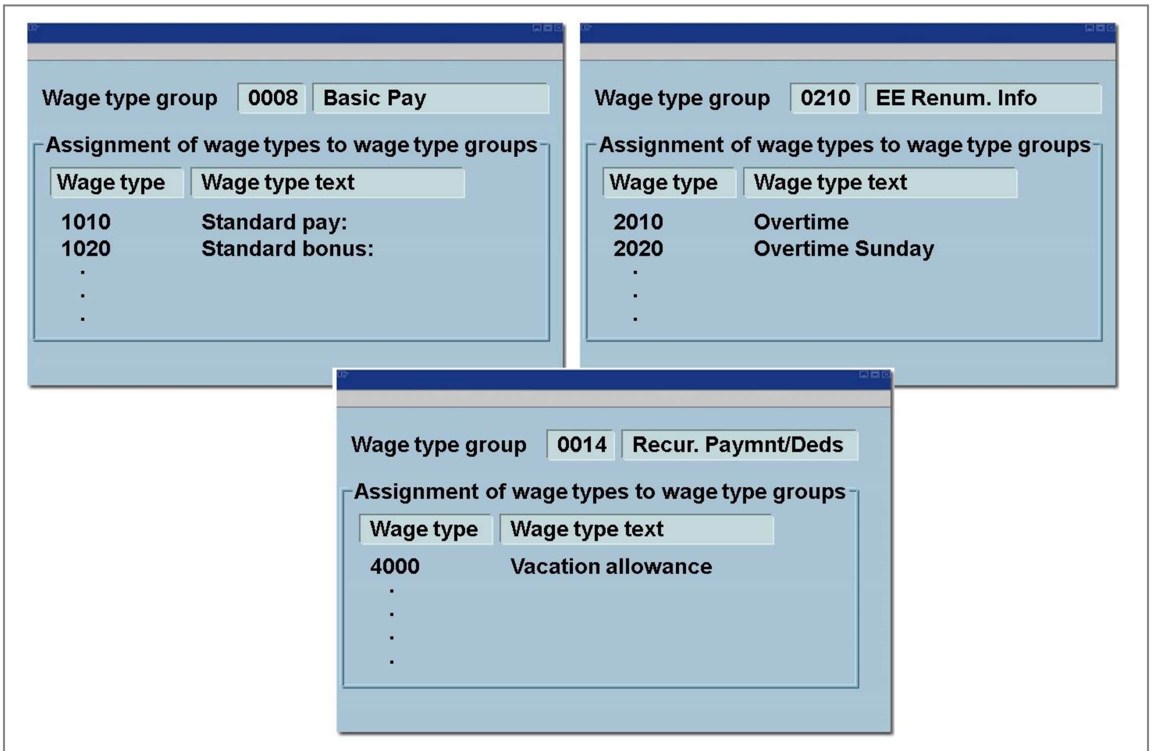


Figure 91: Using Wage Type Groups: An Example

The following are some examples of wage type groups:

- 0008: *Basic Pay*
- 0015: *Additional Payments*
- 2010: *Employee Remuneration Information*

While working with wage type groups, you should consider the following points:

- You must assign all wage types to a wage type group. This is also true for user-defined wage types.
- You have to assign wage types to wage type groups so that you can work with them in the Implementation Guide (IMG).
- You select these wage types according to the wage type group. This means that you can use the IMG to maintain only those wage types that have been assigned to wage type groups.
- In the IMG, you perform wage type maintenance only for the wage types required in that particular section of the IMG.

- If wage types have not been assigned to a wage type group, they do not appear in the wage type maintenance in the IMG.

LESSON SUMMARY

You should now be able to:

- Set up wage types

Unit 11
Lesson 2

Outlining the Setup of Wage Types

LESSON OVERVIEW

This lesson shows you how to set up dialog characteristics in a wage type structure.

Business Example

Dialog characteristics play an important role in managing wage structures in the SAP system. You need to identify and differentiate these characteristics. For this reason, you require the following knowledge:

- An understanding of dialog characteristics
- An understanding of different wage type functions

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Outline wage type configuration tables

Wage Type Configuration Tables

Dialog characteristics define the behavior of a wage type. For example, if you configure the wage type to accept a number, it will accept a number or if you configure it to accept an amount, it will do so.

To ensure that the employees in your company receive the correct payment, you need to define different wage types.

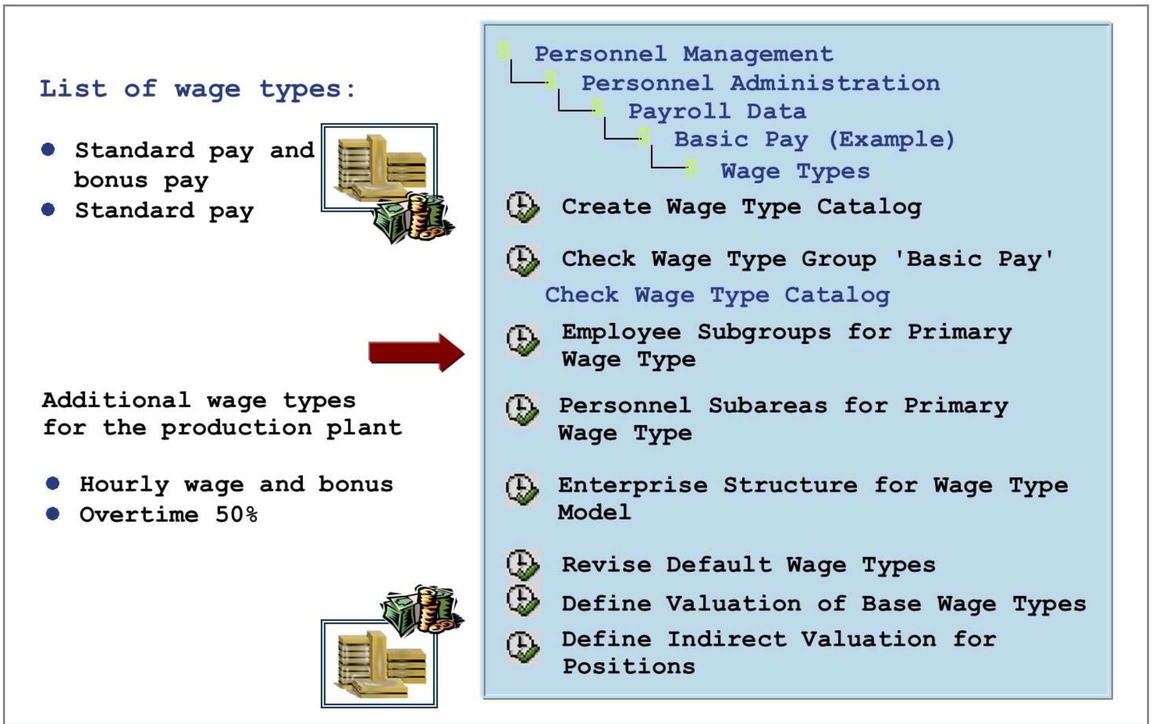


Figure 92: Dialog Characteristics

The IMG steps that you must perform to define dialog wage types appear on the right side of the figure Dialog Characteristics of the Payment Structure in the SAP System using basic pay as an example.

Examples of wage types include the following:

- Standard pay and bonus pay
- Non-PS salary
- Vacation allowance
- Holiday bonus
- Special payments

Additional wage types for a production plant, for example, include the following:

- Hourly wage and bonus
- Hours related to work center
- Overtime 50%
- Clothing Allowance

Examples of Dialog Characteristics

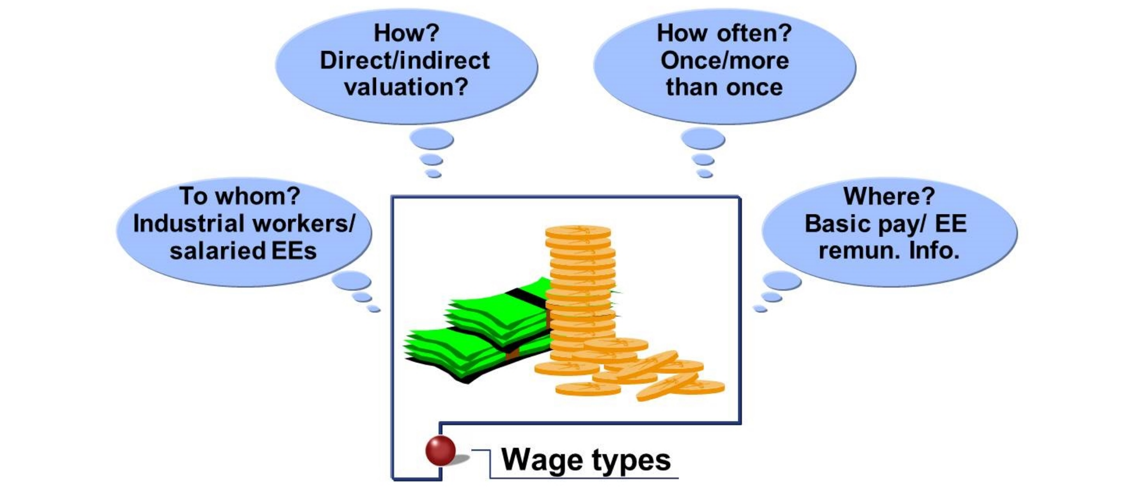


Figure 93: Examples of Dialog Characteristics

You must create wage types before an employee's pay can be calculated.

Wage types have the following functions:

- Permissibility check for wage and salary types for the following:
  - Each personnel area and personnel subarea
  - Each employee group and employee subgroup
  - Each infotype: If an infotype has a subtype that is a wage type, the time constraint determines how often the wage type can be available at any one time
- The operation indicator controls whether a wage type is a payment or a deduction
- The input combination controls which fields must be filled when you enter a wage type amount, number, or unit of time or measurement

A wage type can be valuated indirectly if you enter a module name, module variant, and a rounding indicator. The system then automatically reads the amount from the corresponding tables and you do not need to enter and store it in the *Basic Pay* infotype (0008).

LESSON SUMMARY

You should now be able to:

- Outline wage type configuration tables

Unit 11
Lesson 3

Copying Wage Types

LESSON OVERVIEW

This lesson shows you how to copy SAP sample wage types.

Business Example

The SAP system contains sample wage types, which can be directly copied to address your company's requirements. To do this, you will need to use the wage type copier. For this reason, you require the following knowledge:

- An understanding of the wage type catalog
- An understanding of how to copy and modify wage types

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Copy wage types in the wage type catalog

Wage Type Copying

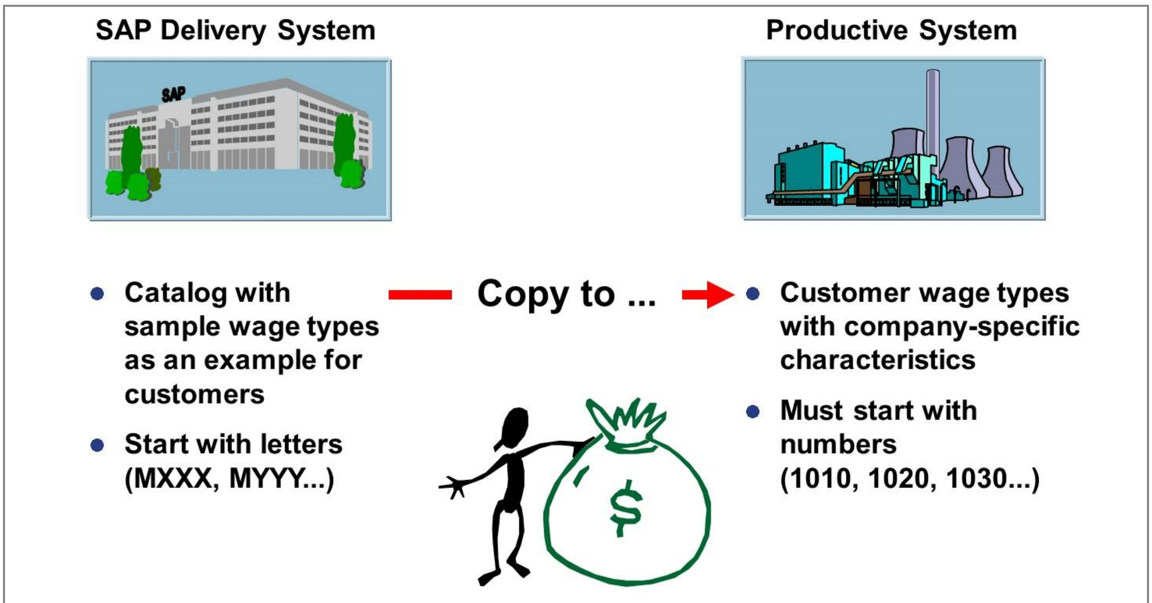


Figure 94: Sample Wage Type Catalog

You can use the wage type copier to copy the SAP sample wage types. These copies can be used as your wage types and you can also modify them to meet your specific requirements.

The wage types that you create via the copy method are included in the same wage type groups and tables as the original wage type from which you copied. You can use the log to check what was copied.

Creating Wage Type Catalog

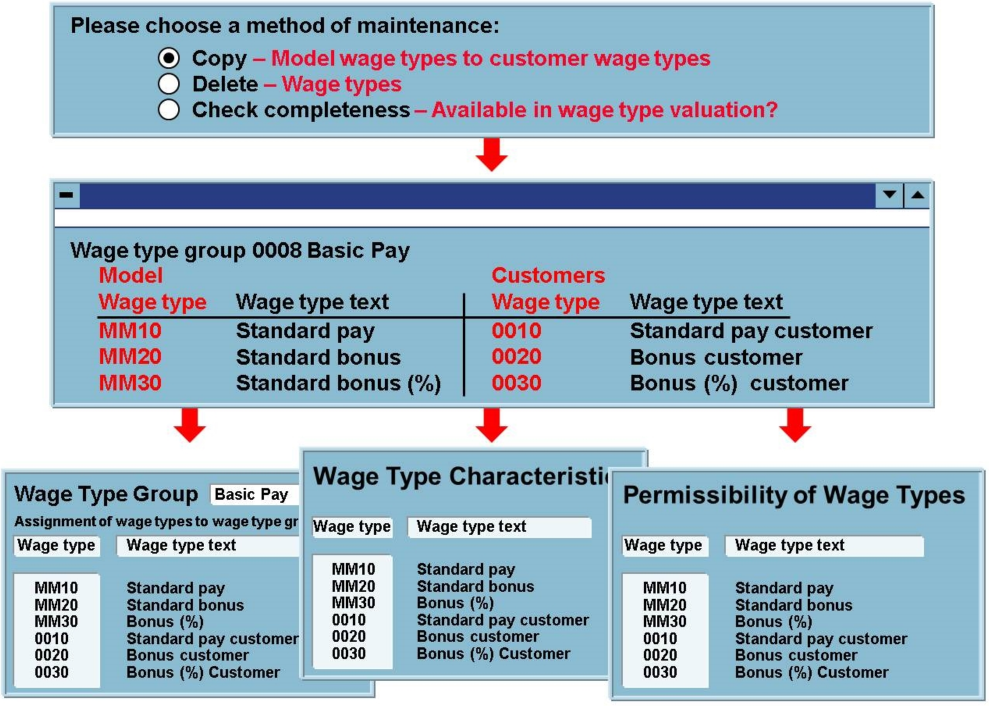


Figure 95: Create Wage Type Catalog

When you copy the wage types, make sure you also copy the following:

- Model wage type characteristics that determine how the wage types behave in dialog characteristics
- Characteristics that determine how the wage types behave in payroll

Individual Steps of the Copy Procedure

You can check and modify the characteristics relevant for payroll when you carry out the payroll Customizing activities.

Figure 96: Checking the Individual Steps of the Copy Procedure

After copying all the wage types, you can check the individual tables to which your customer wage types were copied.

After copying the model wage types to customer wage types, you can also modify the copied wage types to suit to your specific requirements.

Wage Type Catalog

A wage type catalog consists of wage types for each infotype from which you can copy the new wage type using an existing one so that all the table entries are updated automatically.

The SAP system contains sample wage types that meet some of your company's requirements.

All model wage types start with a letter. Your own wage types, that is, the copies of model wage types, must start with a number.

LESSON SUMMARY

You should now be able to:

- Copy wage types in the wage type catalog

Unit 11
Lesson 4

Controlling Wage Type Permissibility

LESSON OVERVIEW

This lesson shows you how to use wage types by controlling their permissibility. It also explains permissibility of wage types for certain employee subgroups and personnel subareas according to your organization's payroll structure.

Business Example

As a personnel administrator working in a company, you need to specify permissions for wage types using certain wage type criterions. For this reason, you require the following knowledge:

- An understanding of wage type permissibility
- An understanding of permissibility of wage types for certain employee subgroups and personnel subareas

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Maintain the use of wage types by controlling their permissibility

Wage Type Permissibility

In the IMG, you can determine which wage types can be entered in the different infotypes. Wage type permissibility also allows you to create settings in Customizing to make sure that only certain wage types are permissible for specific infotypes.

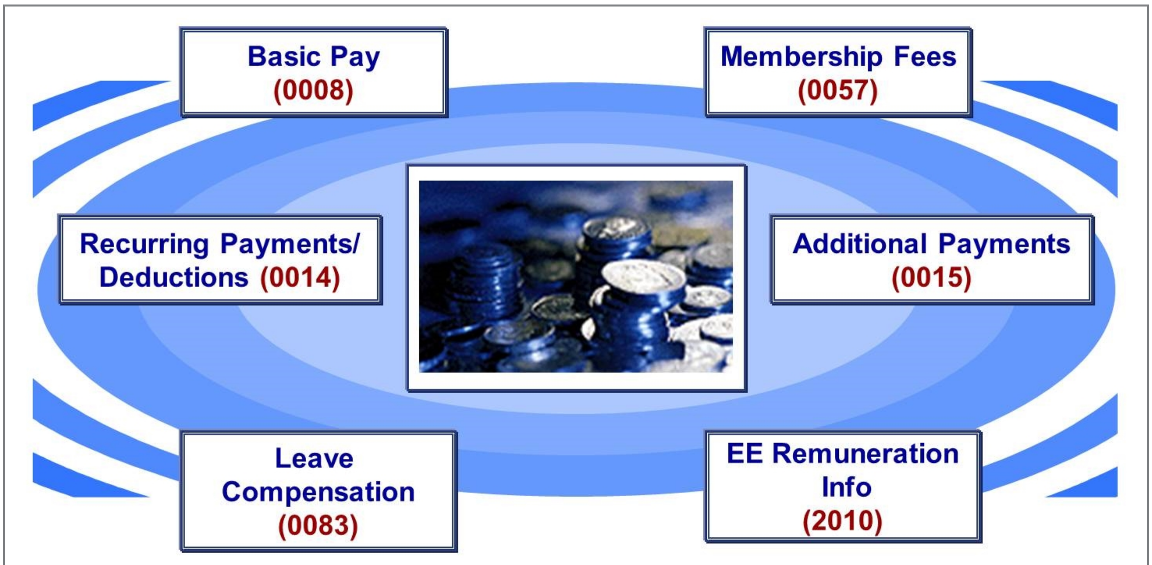


Figure 97: Defining Wage Type Permissibility for Infotypes

If you could select all wage types in all infotypes, it would result in incorrect input data and mean that you are constantly searching for the correct wage type.

If you copy a wage type for an infotype using Create wage type catalog , the system copies all the characteristics belonging to the wage type you are copying. This is also applicable to the wage type permissibility for an infotype.

Wage Type Permissibility for Several Infotypes

For using a wage type in several infotypes, you should enter a key for it in the permissibility tables of the respective infotypes.

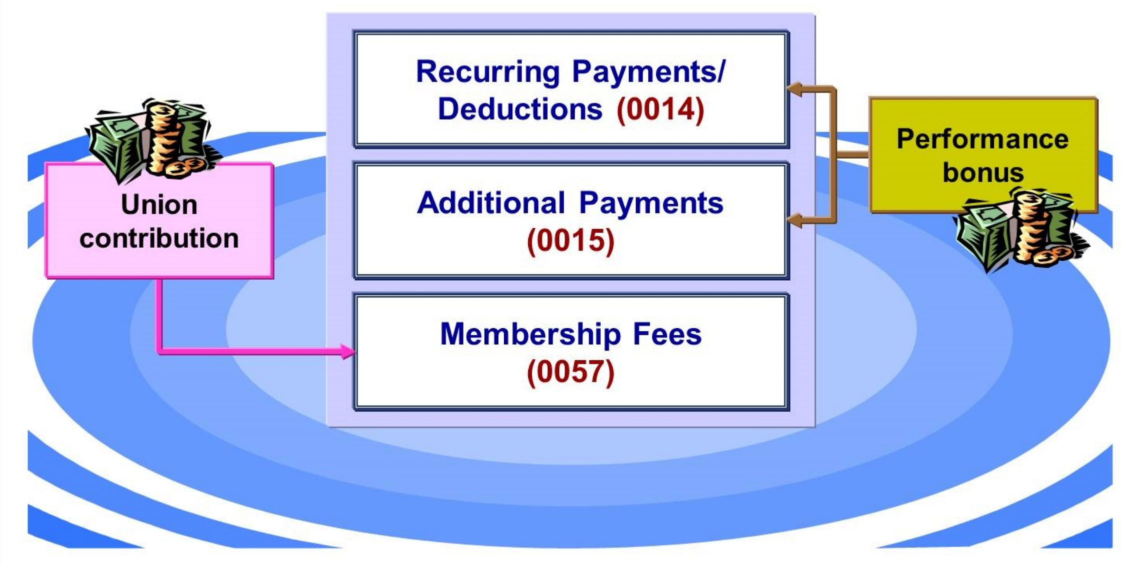


Figure 98: Wage Type Permissibility for Several Infotypes

Input Frequency for Wage Types in Infotypes

By simply configuring a wage type you can determine whether it can be entered once or more than once per payroll period. However, you cannot enter a wage type several times in the *Basic Pay* infotype.

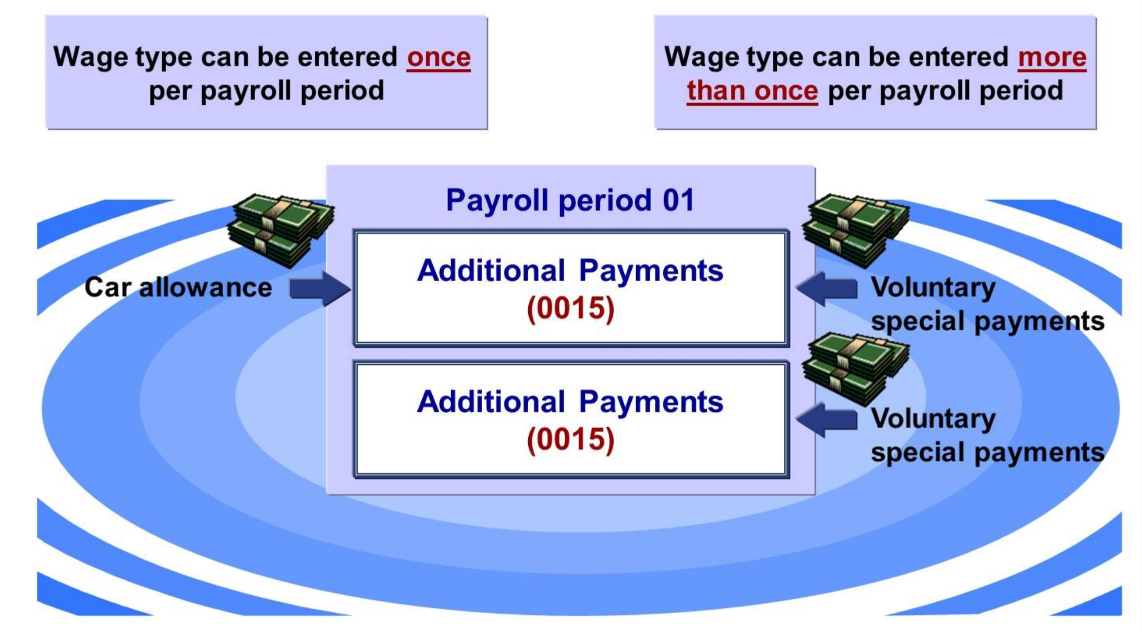


Figure 99: Input Frequency for Wage Types in Infotypes

Permissibility of Wage Types for Employee Subgroups or Personnel Subareas

You can use personnel subarea groupings for primary wage types to define wage type permissibility for a specific enterprise structure, or employee subgroup groupings for primary wage types to define wage type permissibility for a personnel structure.

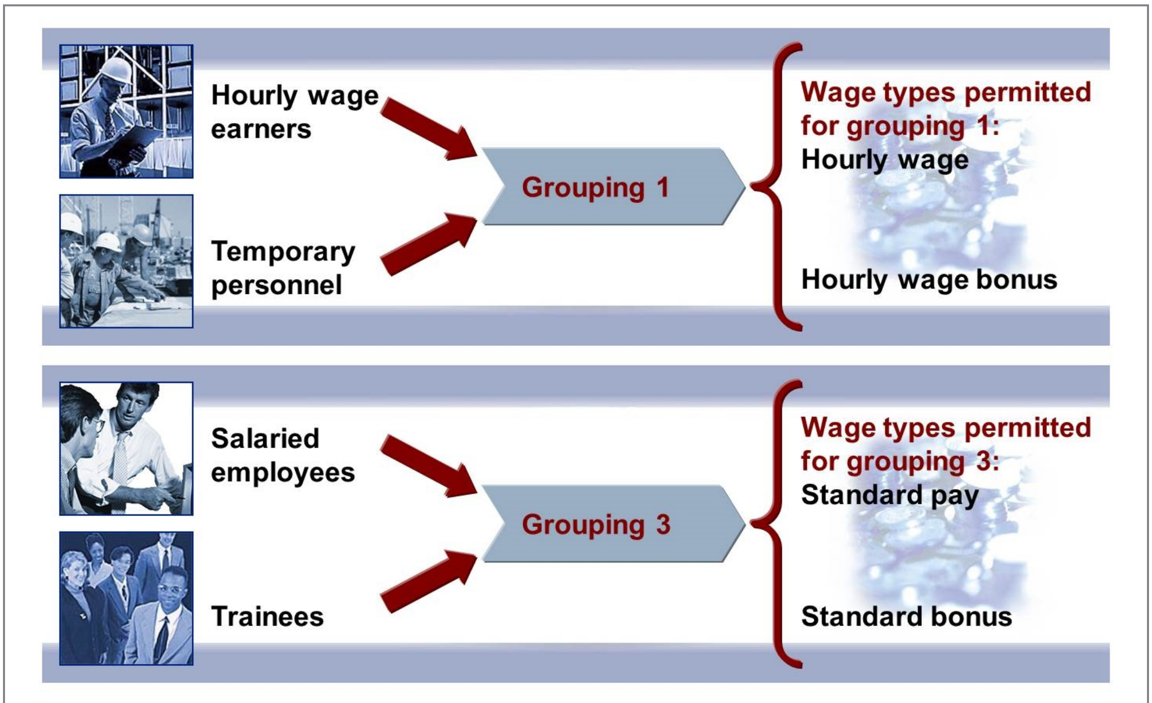


Figure 100: Employee Subgroup Grouping for Primary Wage Type

Defining employee subgroups for primary wage types enables you to group your employee subgroups. You can further use these groups to determine which wage types can be entered for which employees.

Personnel Subarea Groupings for Primary Wage Types

You can also group your personnel subareas, which enables you to control the wage type permissibility for each personnel subarea.

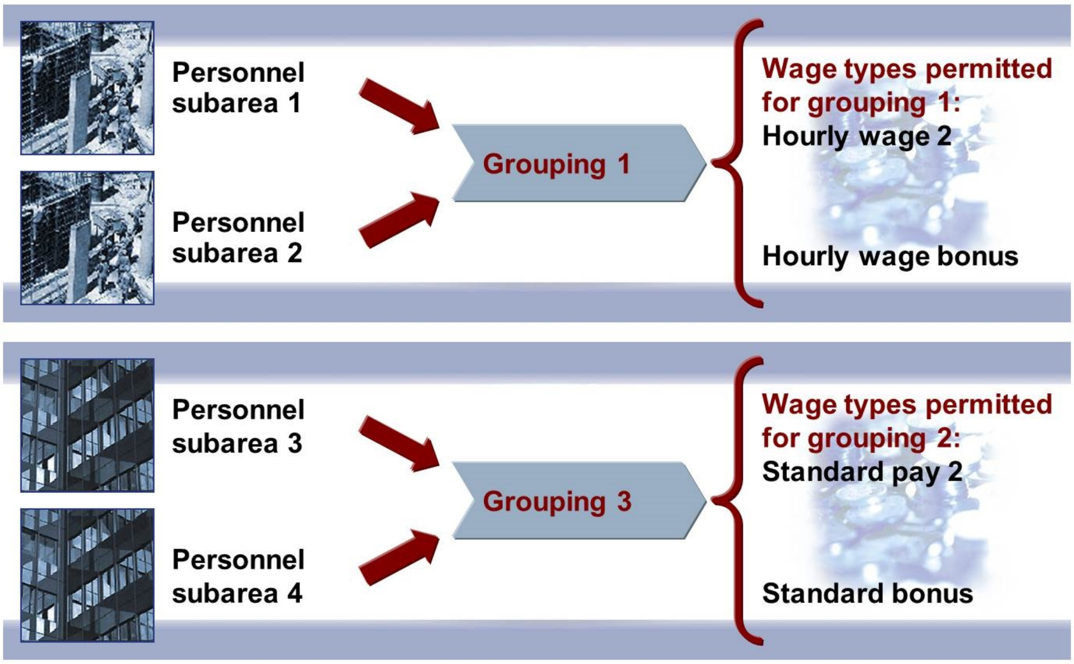


Figure 101: Personnel Subarea Groupings for Primary Wage Types

You can use both employee subgroups and personnel subareas as the basis for grouping.

Wage Type Permissibility for Each Personnel Subarea and Employee Subgroup

In the last step, you specify whether a wage type is permissible for your personnel subarea grouping and your employee subgroup grouping.

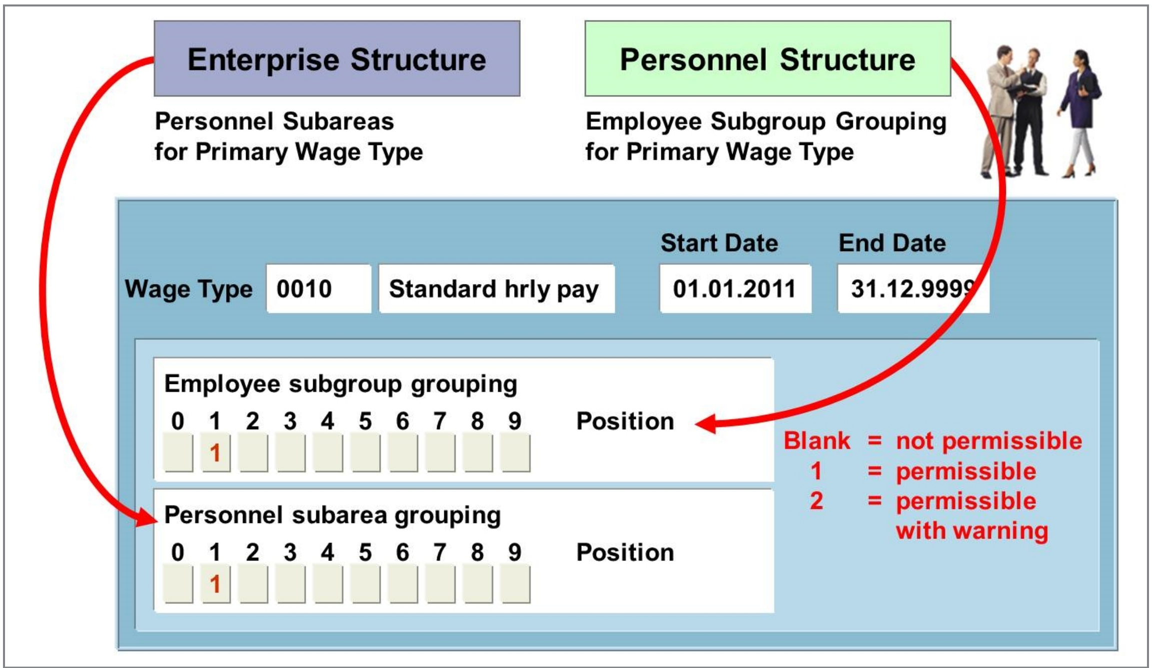


Figure 102: Wage Type Permissibility for Each Personnel Subarea and Employee Subgroup

To do this, you can use the criteria Personnel Structure and/or Enterprise Structure.

LESSON SUMMARY

You should now be able to:

- Maintain the use of wage types by controlling their permissibility

Unit 11
Lesson 5

Configuring Wage Type Characteristics

LESSON OVERVIEW

This lesson shows you how to use wage type characteristics and wage type valuation modules according to your company's payroll structure.

Business Example

You need to customize certain properties of wage types to suit your company's requirements. To do so, you should be able to modify the dialog characteristics of the copied wage types. An indirect valuation of the wage types is also necessary. For this reason, you require the following knowledge:

- An understanding of the configuration of wage type characteristics
- An understanding of different wage type valuation modules including TARIF, PRZNT, SUMME, and ARBPL

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Identify the characteristics of wage types
- Configure wage types to use pay scale data
- Configure wage types to perform calculations on base amounts
- Outline the configuration of wage types to calculate percentages
- Outline the configuration of wage types to use position data
- Identify additional attributes of indirect valuations

Wage Type Characteristics

Wage type characteristics determine how the wage types function when entered in infotypes. For example, based on the configuration, wage type characteristics indicate a number or an amount, or default the values based on indirect valuation.

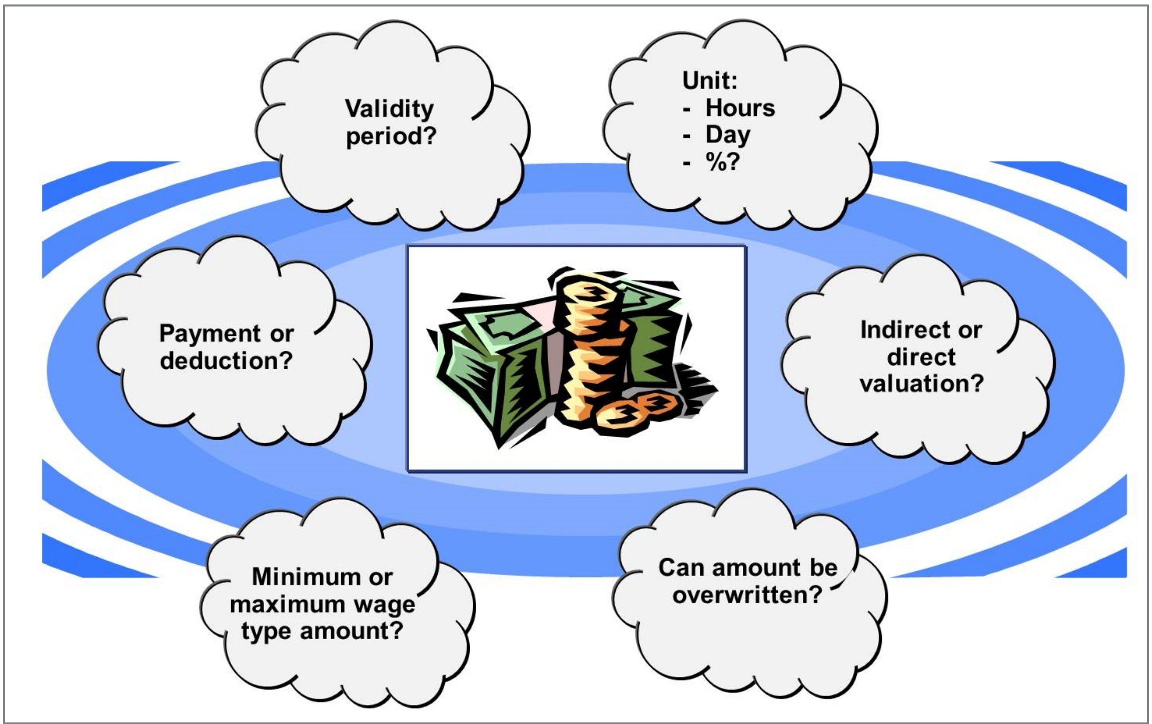


Figure 103: Checking Wage Type Characteristics

You can define the following wage type characteristics:

- Validity period
- Operation indicator
- Minimum and maximum wage type amount, if applicable
- Whether or not the wage type amount should be included in the basic pay total
- Default units of time or measurement, and the minimum and maximum number
- Input combinations for number and amount
- Indirect valuation and its characteristics

Note:
If you intend to implement the HCM Personnel Time Management component, you must also define the wage type as a bonus or a basic hourly pay wage type.

Indirect Valuation of Wage Types

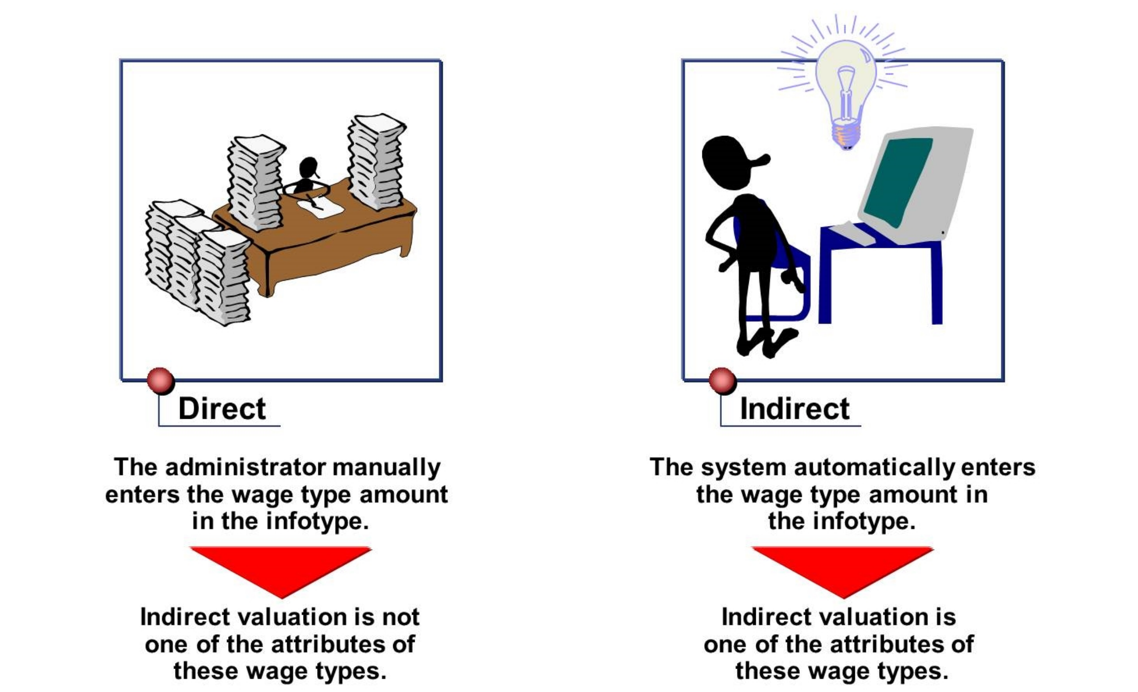


Figure 104: Valuation of Wage Types

Wage types can be valuated in the following ways:

Direct valuation:

The amount that is used to valuate the wage type, is entered in the infotype manually.

Indirect valuation:

The system automatically calculates the wage type amount and enters it in the infotype. In this case, the system imports and calculates the wage type amount from the table; and you do not have to enter it manually.

If the valuation table changes, the system automatically changes the HR master data record in accordance with the start or end date. This helps avoid mass data changes.

The system can perform indirect valuation for the following infotypes:

- *Basic Pay* (0008)
- *Recurring Payments / Deductions* (0014)
- *Additional Payments* (0015)

Indirect Valuation Using the Rule for Wage Type Characteristics

You can indirectly valuate a wage type by specifying the following details:

Module name:

Specifies the fixed valuation table used for indirect valuation.

Module variant:

Controls the read access to the table.

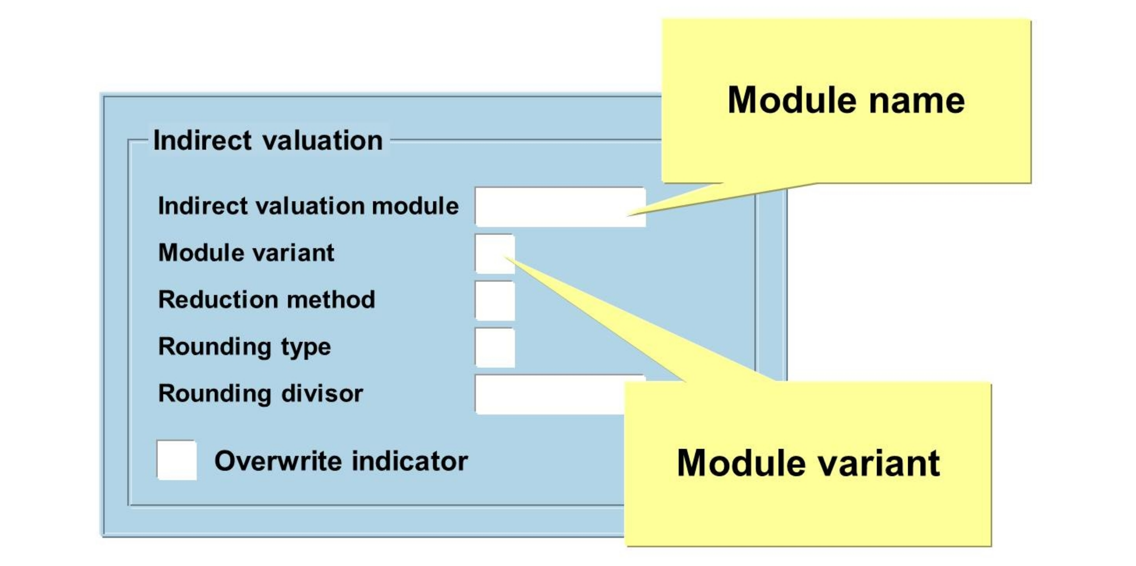


Figure 105: Indirect Valuation Using the Rule for Wage Type Characteristics

Indirect valuation means that the system reads the amount from a table; and you do not have to enter it manually in the infotype.

You define the valuation rule centrally, which means that you do not have to change master data records when you change the valuation.

Wage Type Characteristics Module

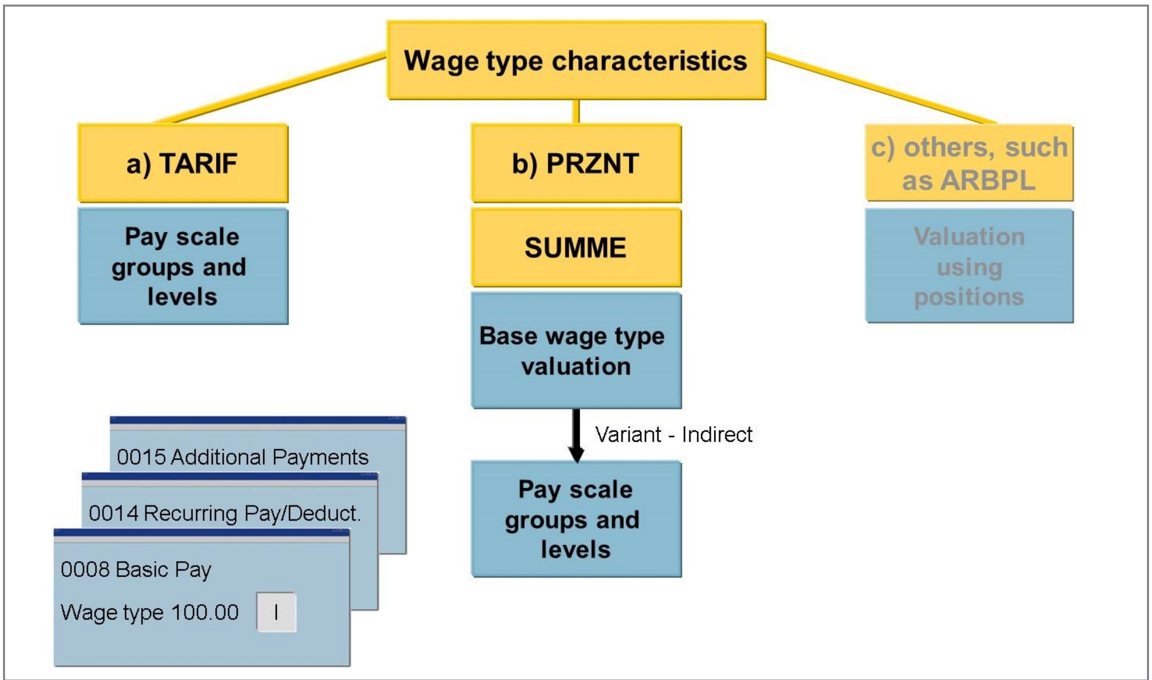


Figure 106: Module for Wage Type Characteristics (Indirect Valuation)

Different modules read different valuation tables.

You can do the following:

- Adapt SAP standard modules to meet your enterprise-specific requirements.

- Create your own modules with specific calculation guidelines.

It is possible to define your own module by using the following tools:

- Indirect Valuation Modules table (T511V_M): Customer-specific module (indirect valuation) that you have defined.
- Business Add-In (BAdI) HR for Indirect Valuation of Wage Types (HR_INDVAL), this BAdI creates or changes the calculation guideline for an indirect valuation module.

You can define your own module in exceptional cases where the standard functionality is not suitable for your requirements.

> Note:
> You can find further information on different modules in the Implementation Guide (IMG) for *Personnel Administration* under *Payroll Data* → *Indirect Valuation* .

TARIF Module

When you enter a wage type in an infotype, the system reads the valuation module and the variant assigned to it in the Wage Type Characteristics table.

The TARIF module uses pay scale data that it takes from the pay scale groups and pay scale levels you entered in the *Basic Pay* infotype. You can use a conversion procedure to change this amount.

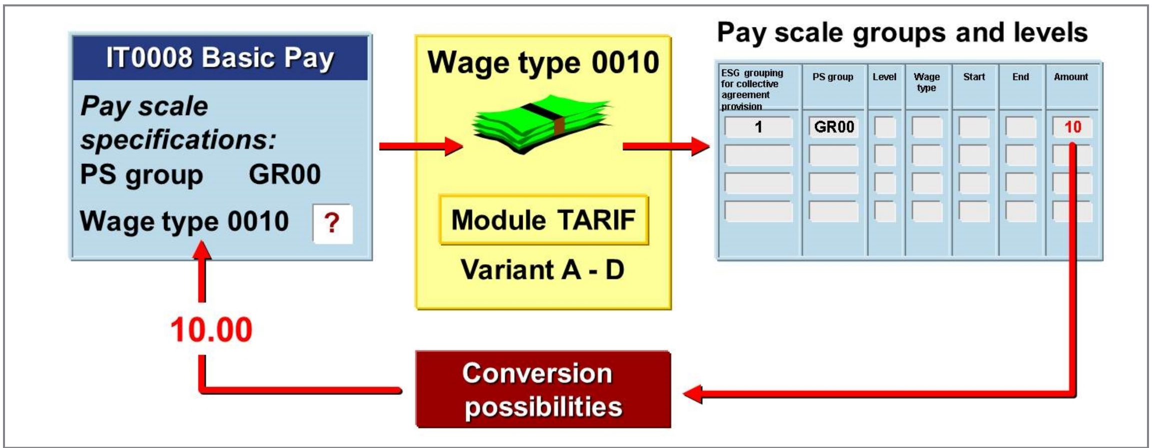


Figure 107: TARIF Module

Module variants control the type of table access. In other words, a module variant determines the table fields to be read by the system.

Indirect Valuation Using the TARIF Module

Pay Scale Groups and Levels

Module	Variant	Employee subgroup grouping for coll.agrmt.prov	Pay scale group	Pay scale level	Wage type	Amount
Pay scale	A	X	X	(X)	-	X
Pay scale	B	X	X	(X)	X	X
Pay scale	C	X	X	-	X	X
Pay scale	D	X	-	-	X	X

X = Required entry
- = Entry must not exist
(X) = Entry can exist

Figure 108: Indirect Valuation Using the TARIF Module

The module TARIF module has four variants (A-D), which have the following meaning:

- A: This variant indicates that valuation is based on the pay scale group and level.
- B: This variant indicates that valuation is based on the pay scale group/level and the specific wage type.
- C: This variant indicates that valuation does not depend on the pay scale level.
- D: This variant indicates that valuation does not depend on the pay scale group/level.

You can use modules for indirect valuation in other infotypes.

TARIF Module in the Recurring Payments or Deductions Infotype

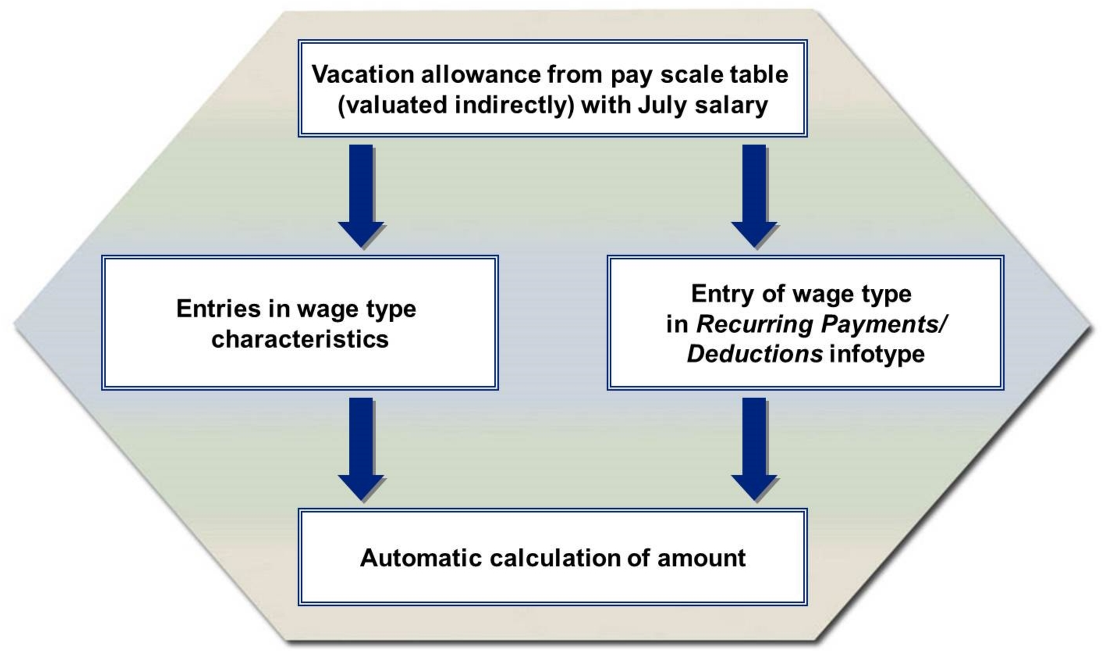


Figure 109: TARIF Module in the Recurring Payments or Deductions Infotype

The example in the figure shows how indirect valuation in the *Recurring Payments/ Deductions* infotype helps determine the vacation allowance that an employee should receive.

PRZNT Module

The PRZNT module is one of the two modules for indirect valuation, the other being SUMME. Both modules are based on how you set up the Base Wage Type Valuation table.

The system calculates certain wage types as a percentage of other wage types.

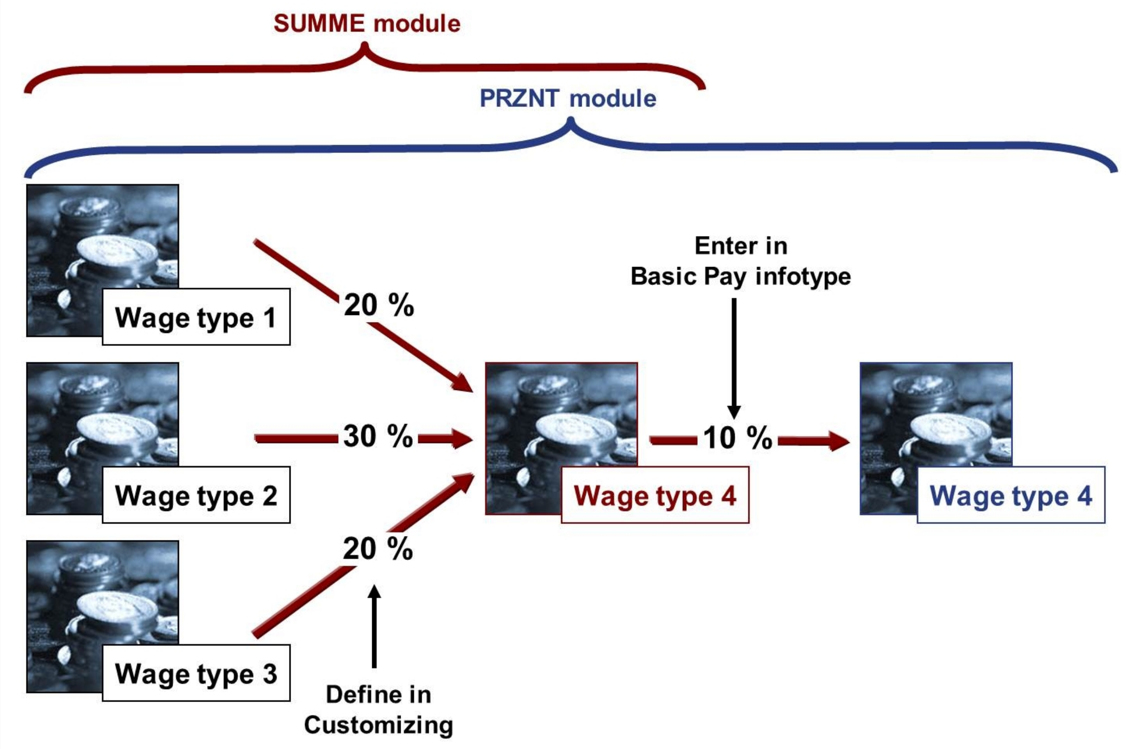


Figure 110: PRZNT or SUMME Module

In the IMG structure, choose: *Personnel Management* → *Personnel Administration* → *Payroll Data* → *Basic Pay* → *Wage Types* → *Define valuation of base wage types* .

In the above example, either one of the following applies:

SUMME:

For this module, the amount for wage type 4 should consist of 20% of wage type 1, 30% of wage type 2, and 20% of wage type 3.

PRZNT:

For this module, the amount for wage type 4 should consist of 20% of wage type 1, 30% of wage type 2, and 20% of wage type 3. In addition, the system should also multiply this amount by a percentage you enter in the *Basic Pay* infotype, which is 10% in this case.

Defining Valuation of Base Wage Types

The system calculates certain wage types as a percentage of other wage types.

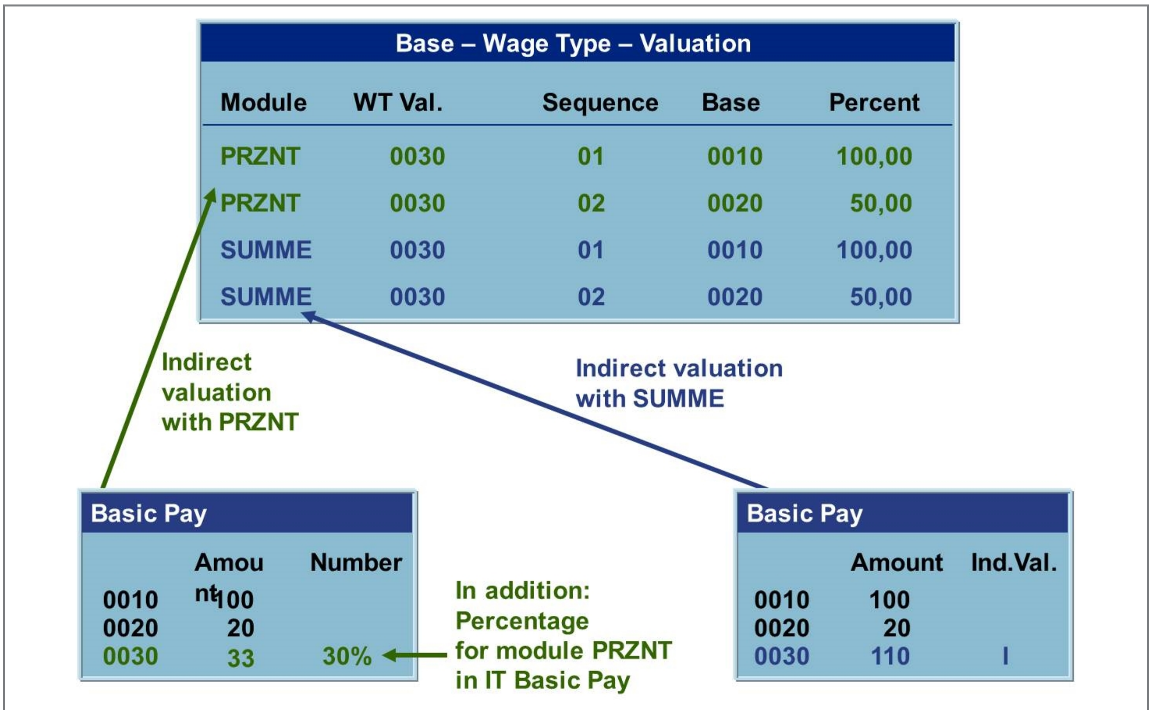


Figure 111: Defining Valuation of Base Wage Types

You can link the wage type to be valuated with several base wage types in the Base Wage Type Valuation table.

PRZNT Module - Indirect Valuation

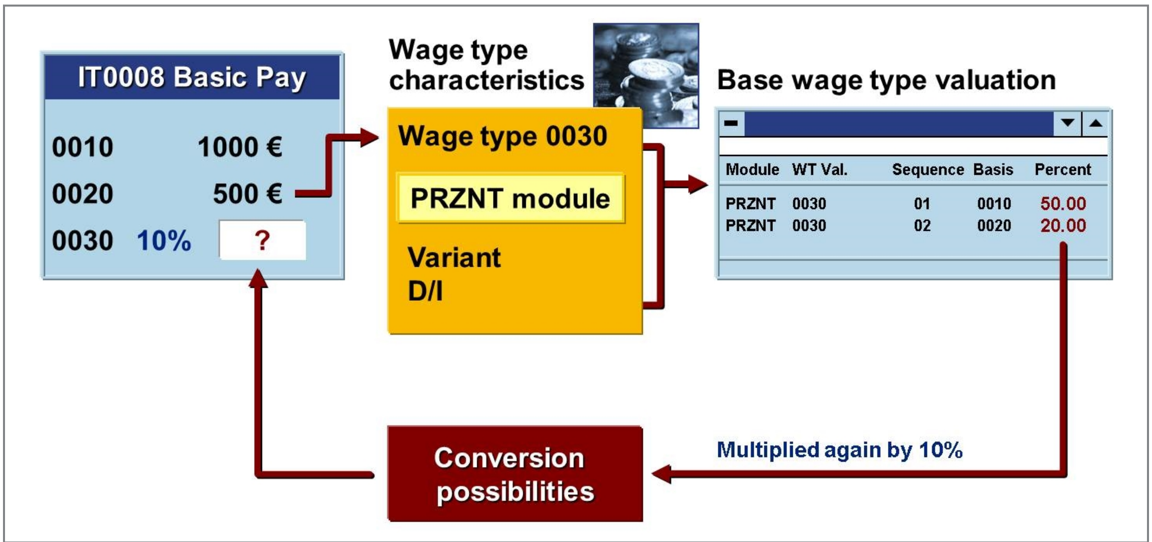


Figure 112: Indirect Valuation Using the PRZNT Module

In *Define Valuation of Base Wage Types* , you must specify the wage types to be used by the system for calculating the percentage bonus (PRZNT).

A distinction is made between direct and indirect variants in the following manner:

Direct variant:

You need to enter the wage types to be used by the system as a valuation basis in the infotype. Otherwise, the system does not consider them. Furthermore, the amount of the

wage type to be valuated is dependent on how high the amounts of the base wage type in the *Basic Pay* infotype are. This is because you can also overwrite the default amounts for indirectly valuated base wage types if you have enabled the overwrite option in the wage type characteristics.

Indirect variant:

You need to ensure that the relevant wage types are not in the infotype. The system determines the value internally and uses it as the basis for additional calculations. This means that the base wage types must be valuated indirectly so that the system can read amounts from a table (for example, the pay scale table).

SUMME Module

You can use the SUMME module for indirect valuation in other infotypes. When making indirect valuation using the SUMME module, you must define the wage types to be used by the system to calculate the percentage bonus.

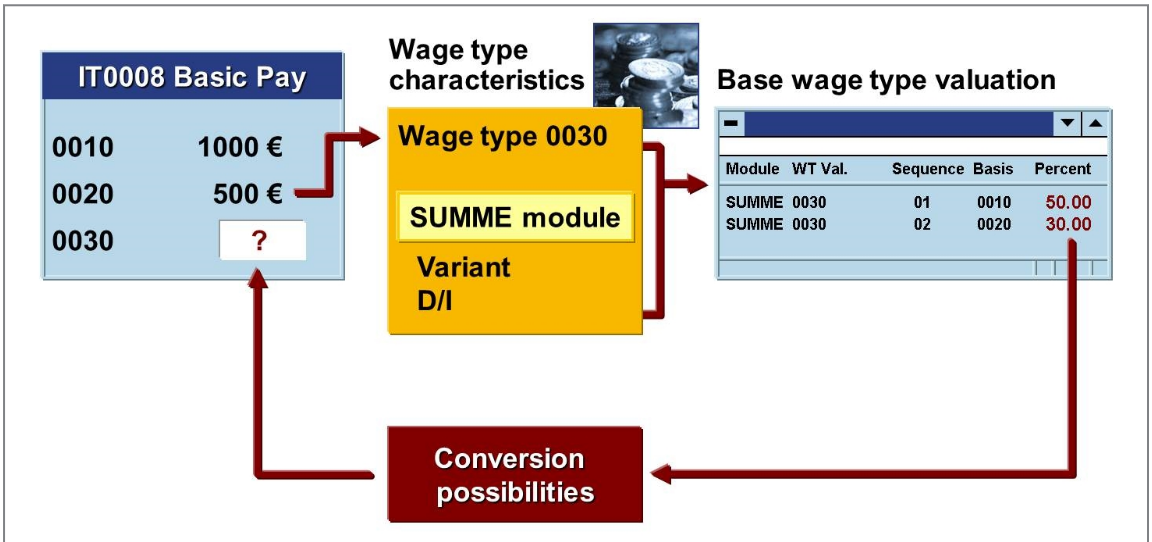


Figure 113: Indirect Valuation Using the SUMME Module

A distinction is also made between direct and indirect variants in the following manner:

Direct variant:

You must enter the wage types that the system will use as a valuation basis in the infotype; otherwise, the system does not consider them.

Indirect variant:

You must ensure that the relevant wage types are not in the infotype.

Unlike in a PRZNT module, in a SUMME module, you enter the percentage value in the table as a fixed value. It is, therefore, linked to the wage type.

The SUMME Module in the Recurring Payments or Deductions Infotype

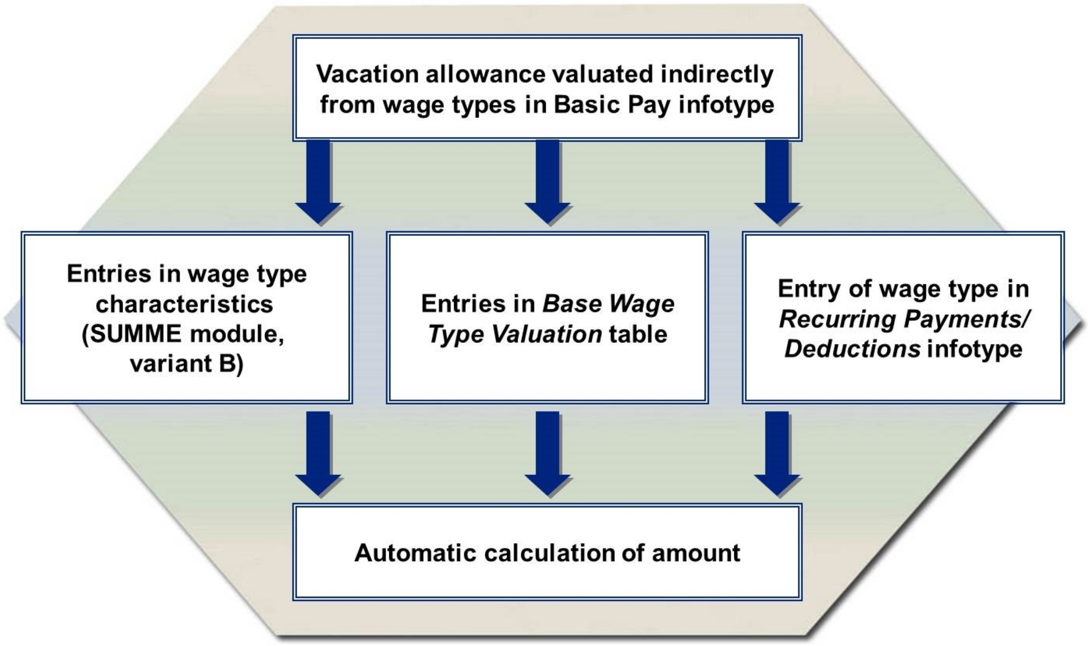


Figure 114: The SUMME Module in the Recurring Payments or Deductions Infotype

The example in the figure shows how indirect valuation in the Recurring Payments or Deductions infotype helps determine the vacation allowance that an employee should receive. In this case, you use the SUMME module and the module variant B.

Examples of Indirect Valuation

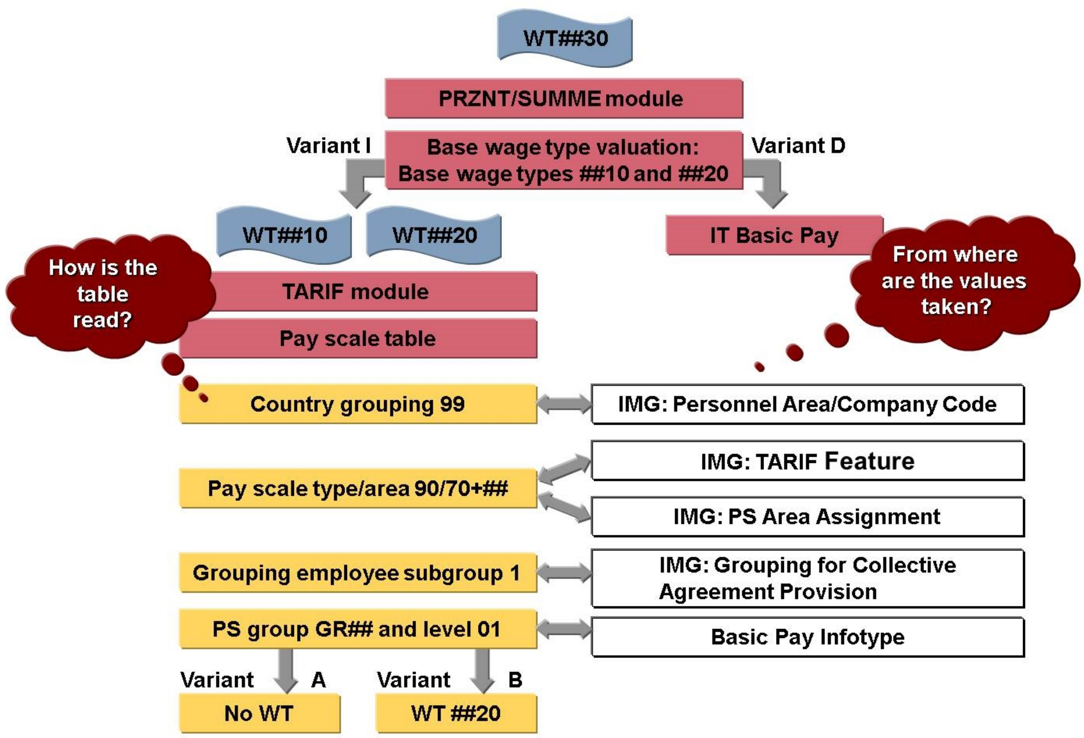


Figure 115: Examples of Indirect Valuation

Note:
You must also store the type of calculation in the Basic Wage Type Valuation table.

ARBPL Module

ARBPL is an indirect valuation module in which the object type and the position number entered in infotype 0001 are used to calculate the wage type amount.

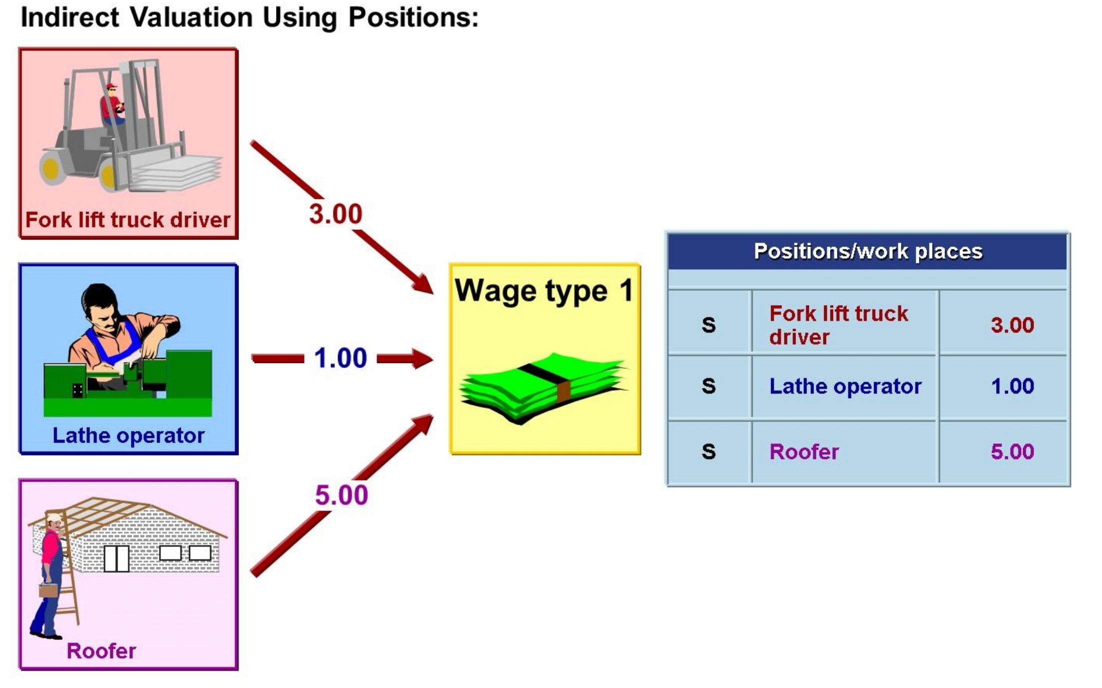


Figure 116: ARBPL Module

If the ARBPL module is used with Variant S (position) for valuation, the system bases its calculations on the position entered in the *Organizational Assignment* infotype (0001) and the country grouping in the Position table. You can enter a payment for the position in this table.

To access the position catalog, use the following menu path:

From the reference IMG, choose *Personnel Management* → *Personnel Administration* → *Payroll Data* → *Basic Pay* → *Wage Types* → *Determine indirect valuation for positions / work centers* .

Additional Attributes of Indirect Valuation

In addition to the module name and defining module variants, you can also enter additional attributes of indirect valuation.

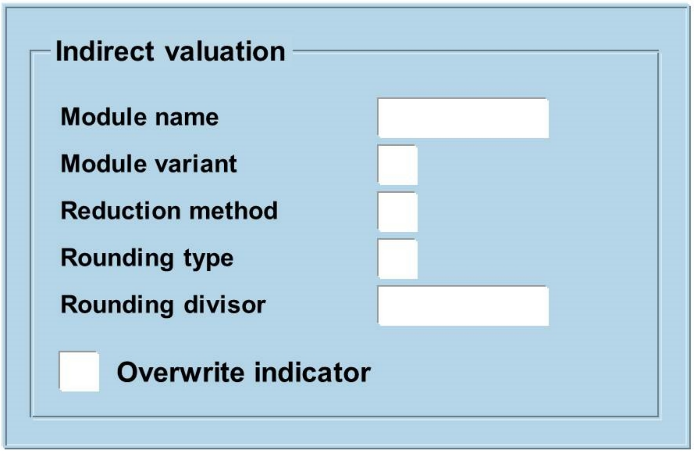


Figure 117: Indirect Valuation: Additional Attributes

Additional Attributes of Indirect Valuation

Following are some of the additional attributes of indirect valuation:

- **Reduction method: For this method, the following values are defined:**
  - Blank or 1 : No reduction
  - 2: Reduction using the capacity utilization level (%) stored in infotype 0008.
  - 3: Reduction in accordance with the relationship between the individual weekly working time and the standard weekly working time.
  - 4: Reduction based on the relationship between the individual hours per week taken from infotype 0007 and the standard weekly working time.
  - 5: Reduction in accordance with the relationship between the individual weekly working time minus the standard weekly working time and the standard weekly working time.
  - 6: Reduction based on the relationship between the hours per week taken from infotype 0007 minus the standard weekly working time and the standard weekly working time.
- **Rounding type: For this type, the following values are defined:**
  - A = amount is rounded down
  - B = amount is rounded up or down
  - C = amount is rounded up
- Rounding divisor: For rounding divisor, values from 0 to 999999 can be defined. For example, 100 means that the amount should be rounded up to a whole euro or dollar.
- Overwrite indicator: This attribute determines whether or not you can overwrite the determined wage type amount in the infotype.

LESSON SUMMARY

You should now be able to:

- Identify the characteristics of wage types
- Configure wage types to use pay scale data
- Configure wage types to perform calculations on base amounts

- Outline the configuration of wage types to calculate percentages
- Outline the configuration of wage types to use position data
- Identify additional attributes of indirect valuations

Defaulting Wage Types

LESSON OVERVIEW

This lesson shows you how to implement the wage type model and its features to meet your business requirements.

Business Example

As a personnel administrator, you are required to define wage type models. You need to set up the system with Customizing settings so that wage types are automatically proposed in the *Basic Pay* infotype when hiring an employee. The default wage types will depend on the category of the employee, which will be configured by you. For this reason, you require the following knowledge:

- An understanding of how to create a default wage type
- An understanding of the LGMST feature

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Configure default values for the basic pay infotypee

Default Wage Types

If you want the system to suggest a default wage type for basic pay, this wage type must be included in a wage type model.

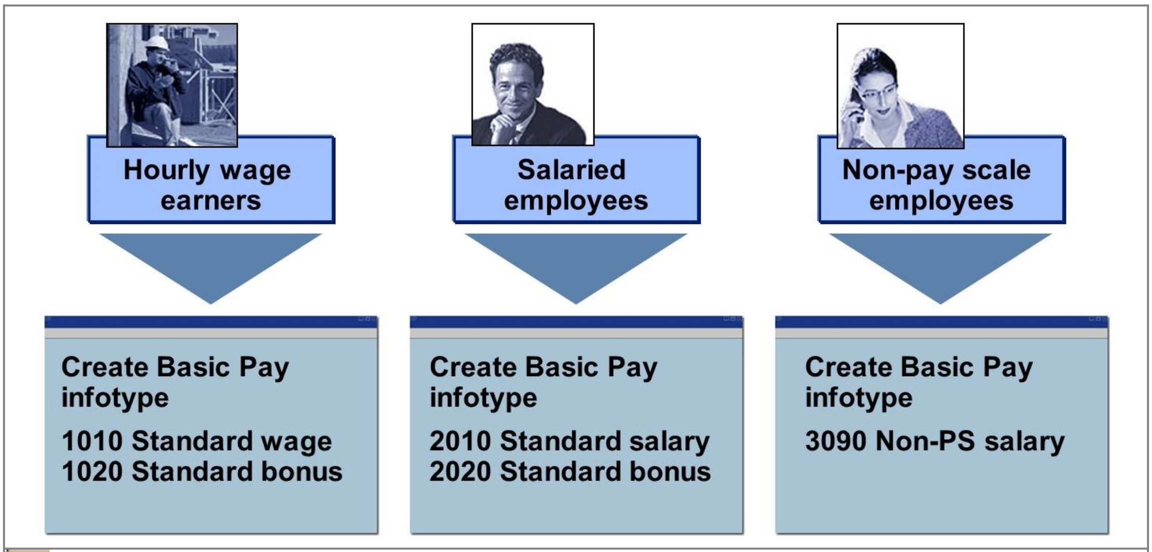


Figure 118: Default Wage Types for Basic Pay

The system suggests a wage type model based on an employee's organizational assignment.

For example, an employee's organizational assignment includes the following:

- Company code
- Personnel area
- Employee group
- Employee subgroup

The system uses this information to define a default for a wage type model.

LGMST Feature

The LGMST feature helps reduce the amount of routine work involved in creating a *Basic Pay* infotype record (0008). The system displays the default wage types for the administrator either as required or optional entries. The default Wage type model is selected based on the decision tree of the LGMST feature.

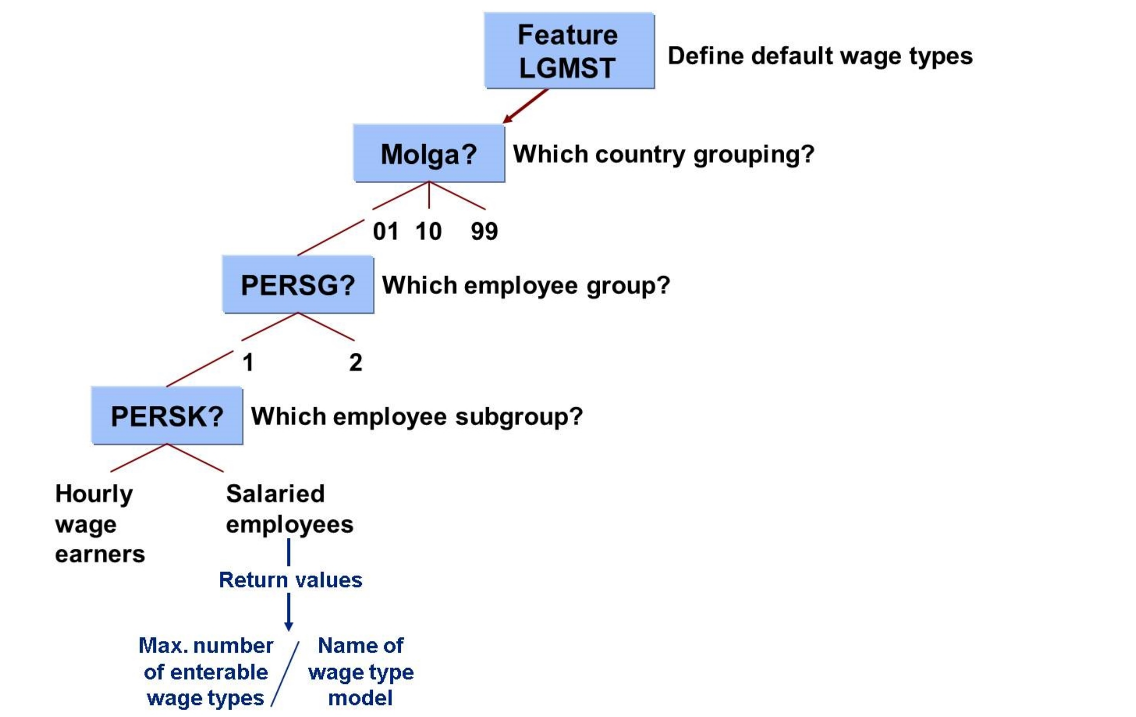


Figure 119: LGMST Feature

You can use the Default Wage Types for Basic Pay Table to define wage types for the *Basic Pay* infotype (0008). An entry is accessed by processing a decision tree using the LGMST feature.

The LGMST feature has the following two return values:

- The maximum number of wage type lines available for input in the *Basic Pay* infotype
- The wage type model that the system is to use

Wage Type Models

A wage type model allows you to define the sequence of the defaulted wage types. It also indicates whether or not, you can overwrite the defaulted wage type (in the *Mode* field). The IMG activity performed for the aforesaid functionalities is called Revise Default Wage Types .

Wage Type Model	Sequence	Mode	Wage Type
HRLY00	01	F	0010
HRLY00	02	F	0020
HRLY00	03	O	0030

Figure 120: Defining Wage Type Models

LESSON SUMMARY

You should now be able to:

- Configure default values for the basic pay infotypee

Learning Assessment

1. SAP uses the wage type group concept to group wage types that have similar characteristics with regard to payroll.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. Which of the following is used to identify payments and deductions?

   Choose the correct answer.

   - [ ] A Basic Pay
   - [ ] B Wage Type
   - [ ] C Payroll
   - [ ] D Cost centers

3. Which of the following statements holds true for wage type groups?

   Choose the correct answers.

   - [ ] A You must assign all wage types to a wage type group.
   - [ ] B In the IMG, you can perform wage type maintenance for different sections of the IMG.
   - [ ] C If wage types have not been assigned to a wage type group, they do not appear in the wage type maintenance in the IMG.
   - [ ] D You have to assign wage types to wage type groups, so that you can work with the IMG.

4. A wage type amount would be automatically filled in indirect valuation.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

5. Which of the following are characteristics of wage types?

   Choose the correct answers.

   - [ ] A The operation indicator
   - [ ] B The input combination
   - [ ] C Automatic update of wage type characteristics

6. You must create wage types before an employee's master data is updated for salary.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

7. All model wage types start with a letter.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

8. Your own wage types must start with the following:

   Choose the correct answer.

   - [ ] A Alphabet
   - [ ] B Alphanumeric
   - [ ] C Number
   - [ ] D Special character

9. Which of the following statements hold true for copying wage types?

   Choose the correct answers.

   - [ ] A You can check and modify the characteristics relevant for payroll when you carry out the payroll Customizing activities.
   - [ ] B You do not need to copy Model wage type characteristics.
   - [ ] C The wage types that you create via the copy method are included in all of the wage type groups and tables as the original wage type from which you copied.
   - [ ] D A completeness check can be performed for the wage type copy.

10. If you copy a wage type for an infotype using **Create wage type catalog** , the system copies all the tables and characteristics belonging to the wage type you are copying.

    Determine whether this statement is true or false.

    - [ ] True
    - [ ] False

11. To use a wage type in several infotypes, you need to enter a key for it in the:

    Choose the correct answer.

    - [ ] A Permissibility tables of the respective infotypes
    - [ ] B Wage type tables
    - [ ] C Database
    - [ ] D Personnel Management

12. Which of the following statements hold true when you are working with employee subgroups?

    Choose the correct answers.

    - [ ] A Defining employee subgroups for primary wage types means that you group your employee subgroups.
    - [ ] B You cannot use personnel subarea groupings for primary wage types to define wage type permissibility for a specific Personnel subarea.
    - [ ] C You can use these groupings to determine which wage types can be entered for which employees.
    - [ ] D There is no copy of the relevant tables when you copy the employee subgroups.

13. You can enter the same wage type multiple times in the *Basic Pay* infotype.

    Determine whether this statement is true or false.

    - [ ] True
    - [ ] False

14. When you define the valuation rule centrally, you have to change master data records while changing the valuation.

    Determine whether this statement is true or false.

    - [ ] True
    - [ ] False

15. When making indirect valuation using the SUMME module, you must define the wage types to be used in the system to calculate the percentage for arriving at the amount for the valuated wage type bonus.

    Determine whether this statement is true or false.

    - [ ] True
    - [ ] False

16. Which of the following statements hold true for the ARBPL module?

    Choose the correct answers.

    - [ ] A ARBPL is a direct valuation module.
    - [ ] B It uses the object type and the position number entered in infotype 0001 to calculate the wage type amount.
    - [ ] C With variant S (position) to valuate, the system bases its calculations on the position entered in the *Organizational Assignment* infotype (0001).

17. The TARIF module has ____ variants.

    Choose the correct answer.

    - [ ] A seven
    - [ ] B six
    - [ ] C two
    - [ ] D four

18. A wage type model allows you to define the sequence of the defaulted wage types.

    Determine whether this statement is true or false.

    - [ ] True
    - [ ] False

19. The LGMST feature returns the following values:

    Choose the correct answers.

    - [ ] A The maximum number of permissible wage types in the *Basic Pay* infotype
    - [ ] B An entry processed by the infotype
    - [ ] C An entry processed by the decision tree
    - [ ] D The wage type model that the system is going to use

20. Which of the following statements hold true for a wage type model?

Choose the correct answers.

- [ ] A A wage type model allows you to define the sequence of the defaulted wage types.
- [ ] B The IMG activity concerned with the wage type model is called Define Default Wage Types .
- [ ] C A wage type model indicates whether or not, you can overwrite the defaulted wage type.

21. If you want the system to suggest a default wage type for basic pay, this wage type must be included in a wage type model.

Determine whether this statement is true or false.

- [ ] True
- [ ] False

Unit 11

Learning Assessment - Answers

1. SAP uses the wage type group concept to group wage types that have similar characteristics with regard to payroll.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

2. Which of the following is used to identify payments and deductions?

   Choose the correct answer.

   [ ] A Basic Pay

   [X] B Wage Type

   [ ] C Payroll

   [ ] D Cost centers

3. Which of the following statements holds true for wage type groups?

   Choose the correct answers.

   [X] A You must assign all wage types to a wage type group.

   [ ] B In the IMG, you can perform wage type maintenance for different sections of the IMG.

   [X] C If wage types have not been assigned to a wage type group, they do not appear in the wage type maintenance in the IMG.

   [X] D You have to assign wage types to wage type groups, so that you can work with the IMG.

4. A wage type amount would be automatically filled in indirect valuation.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

5. Which of the following are characteristics of wage types?

   Choose the correct answers.

   - [X] A The operation indicator
   - [X] B The input combination
   - [ ] C Automatic update of wage type characteristics

6. You must create wage types before an employee's master data is updated for salary.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

7. All model wage types start with a letter.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

8. Your own wage types must start with the following:

   Choose the correct answer.

   - [ ] A Alphabet
   - [ ] B Alphanumeric
   - [X] C Number
   - [ ] D Special character

9. Which of the following statements hold true for copying wage types?

   Choose the correct answers.

   - [x] A You can check and modify the characteristics relevant for payroll when you carry out the payroll Customizing activities.
   - [ ] B You do not need to copy Model wage type characteristics.
   - [x] C The wage types that you create via the copy method are included in all of the wage type groups and tables as the original wage type from which you copied.
   - [x] D A completeness check can be performed for the wage type copy.

10. If you copy a wage type for an infotype using Create wage type catalog , the system copies all the tables and characteristics belonging to the wage type you are copying.

    Determine whether this statement is true or false.

    - [x] True
    - [ ] False

11. To use a wage type in several infotypes, you need to enter a key for it in the:

    Choose the correct answer.

    - [x] A Permissibility tables of the respective infotypes
    - [ ] B Wage type tables
    - [ ] C Database
    - [ ] D Personnel Management

12. Which of the following statements hold true when you are working with employee subgroups?

    Choose the correct answers.

    - [x] A Defining employee subgroups for primary wage types means that you group your employee subgroups.
    - [ ] B You cannot use personnel subarea groupings for primary wage types to define wage type permissibility for a specific Personnel subarea.
    - [x] C You can use these groupings to determine which wage types can be entered for which employees.
    - [ ] D There is no copy of the relevant tables when you copy the employee subgroups.

13. You can enter the same wage type multiple times in the *Basic Pay* infotype.

    Determine whether this statement is true or false.

    [ ] True

    [X] False

14. When you define the valuation rule centrally, you have to change master data records while changing the valuation.

    Determine whether this statement is true or false.

    [ ] True

    [X] False

15. When making indirect valuation using the SUMME module, you must define the wage types to be used in the system to calculate the percentage for arriving at the amount for the valuated wage type bonus.

    Determine whether this statement is true or false.

    [X] True

    [ ] False

16. Which of the following statements hold true for the ARBPL module?

    Choose the correct answers.

    [ ] A ARBPL is a direct valuation module.

    [X] B It uses the object type and the position number entered in infotype 0001 to calculate the wage type amount.

    [X] C With variant S (position) to valuate, the system bases its calculations on the position entered in the *Organizational Assignment* infotype (0001).

17. The TARIF module has ____ variants.

    Choose the correct answer.

    [ ] A seven

    [ ] B six

    [ ] C two

    [X] D four

18. A wage type model allows you to define the sequence of the defaulted wage types.

Determine whether this statement is true or false.

[X] True

[ ] False

19. The LGMST feature returns the following values:

Choose the correct answers.

[X] A The maximum number of permissible wage types in the *Basic Pay* infotype

[ ] B An entry processed by the infotype

[ ] C An entry processed by the decision tree

[X] D The wage type model that the system is going to use

20. Which of the following statements hold true for a wage type model?

Choose the correct answers.

[X] A A wage type model allows you to define the sequence of the defaulted wage types.

[ ] B The IMG activity concerned with the wage type model is called Define Default Wage Types .

[X] C A wage type model indicates whether or not, you can overwrite the defaulted wage type.

21. If you want the system to suggest a default wage type for basic pay, this wage type must be included in a wage type model.

Determine whether this statement is true or false.

[X] True

[ ] False

UNIT 12 Remuneration Reports

UNIT OBJECTIVES

- Perform a standard pay increase
- Execute the update of pay scale reclassifications

Unit 12
Lesson 1

Executing a Standard Pay Increase

LESSON OVERVIEW

This lesson shows you how to execute a standard pay increase.

Business Example

As a personnel administrator, you are required to track various changes in the remuneration and pay structure. When an employee is promoted, the standard pay should be increased accordingly. To do so you will need to update the remuneration changes for a standard pay increase. For this reason, you require the following knowledge:

- An understanding of how to execute a standard pay increase
- An understanding of the different types of standard pay increases

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Perform a standard pay increase

Standard Pay Increase

A Standard pay increase allows you to automatically increase an employee's standard pay. You can use this function for employees whose basic pay is determined on the basis of the pay scale structure to which they are assigned during Customizing.

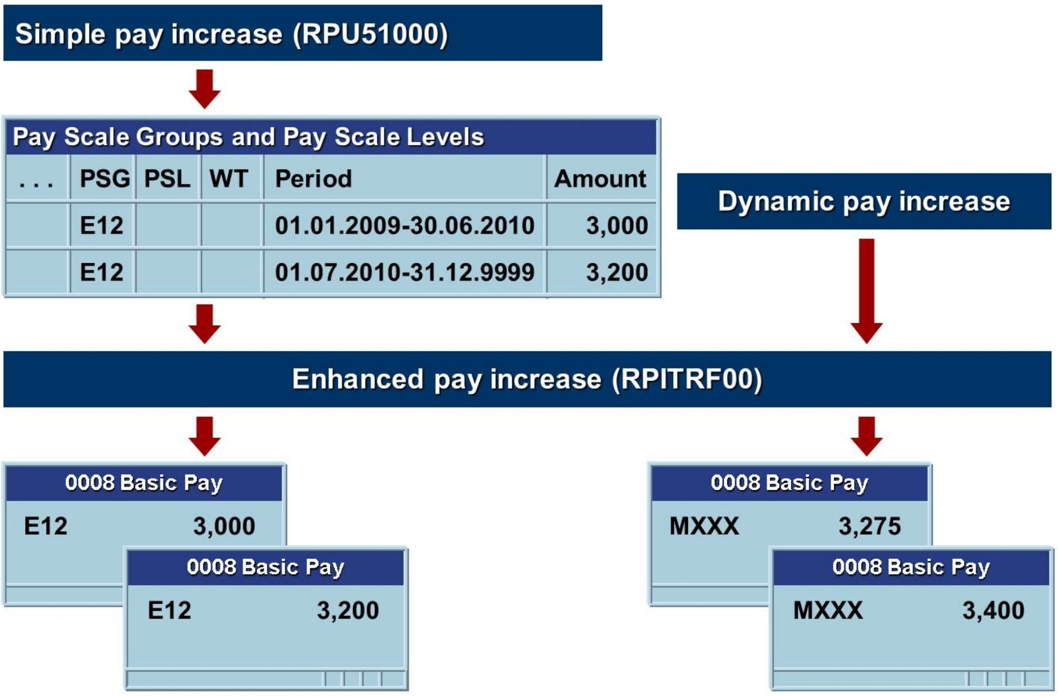


Figure 121: Standard Pay Increase

Following are the two different procedures to determine the pay increase:

- Simple standard pay increase: In a simple standard pay increase, a change is made to a Customizing table (T510). This means that retroactive accounting recognition is not automatically triggered. This may be necessary, for example, if you have retroactive increases that relate to the payroll past. In addition, a simple standard pay increase does not create a new infotype record.
- Enhanced standard pay increase: If you run the enhanced standard pay increase, the system recognizes it as relevant for retroactive accounting and creates a new infotype record.

Which of these two procedures – standard or enhanced standard pay increase – is used to determine the pay increase depends on the following criteria:

- Whether the system should increase the amounts in the Customizing system by a certain amount or by a percentage.
- Whether the system should update the pay history in the *Basic Pay* infotype (0008).

Performing a Simple Standard Pay Increase

When increasing an employee's pay through a simple standard pay increase, you must first run report RPU51000 to change the pay scale groups and levels on the key date.

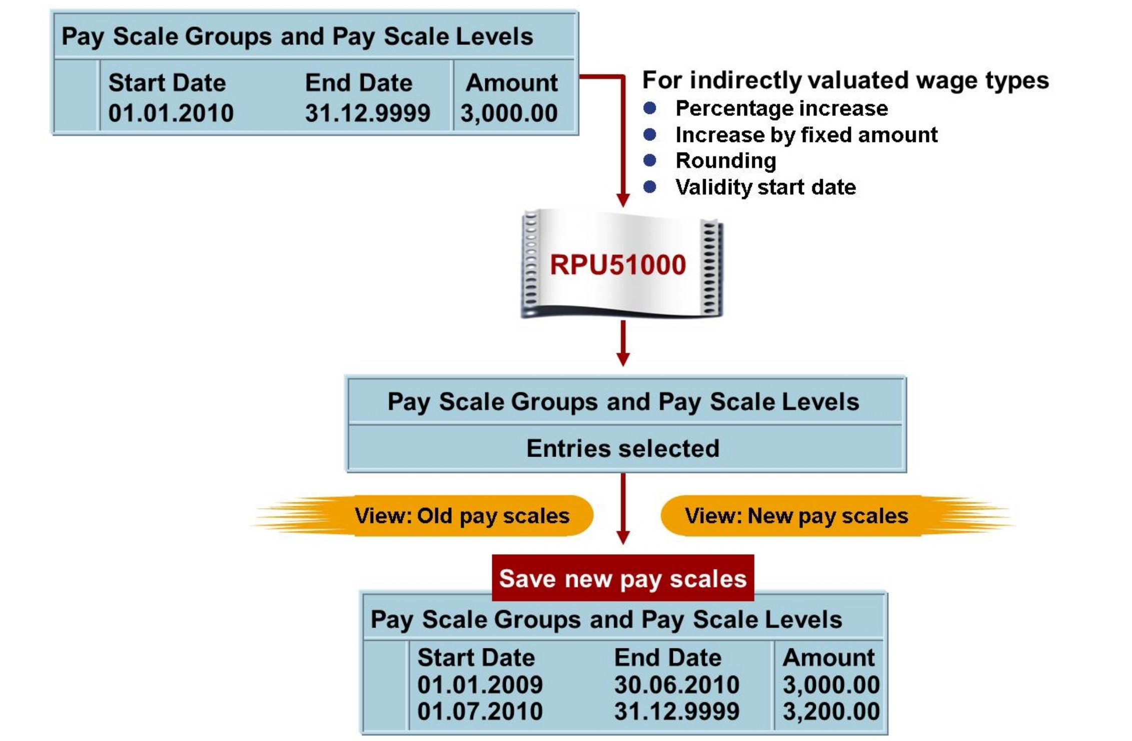


Figure 122: Performing a Simple Standard Pay Increase

The system reads the actual monetary value from the relevant table when performing indirect valuation. If you enter a date in the *Indirect valuation* field in the *Basic Pay* infotype (0008), the system displays the currently valid amounts.

To facilitate the processing of a standard pay increase, the activities for changing Customizing settings and master data are kept separate. If you want to create a *Basic Pay* history (0008), run report RPITRF00 to delimit the basic pay records on the key date specified.

Performing an Enhanced Standard Pay Increase

Payroll processes the *Basic Pay* infotype (0008), as well as pay scale groups and levels for a specific period. When you increase amounts by changing the settings in Customizing, the system updates the *Basic Pay* infotype history (0008) for indirectly valuated wage types.

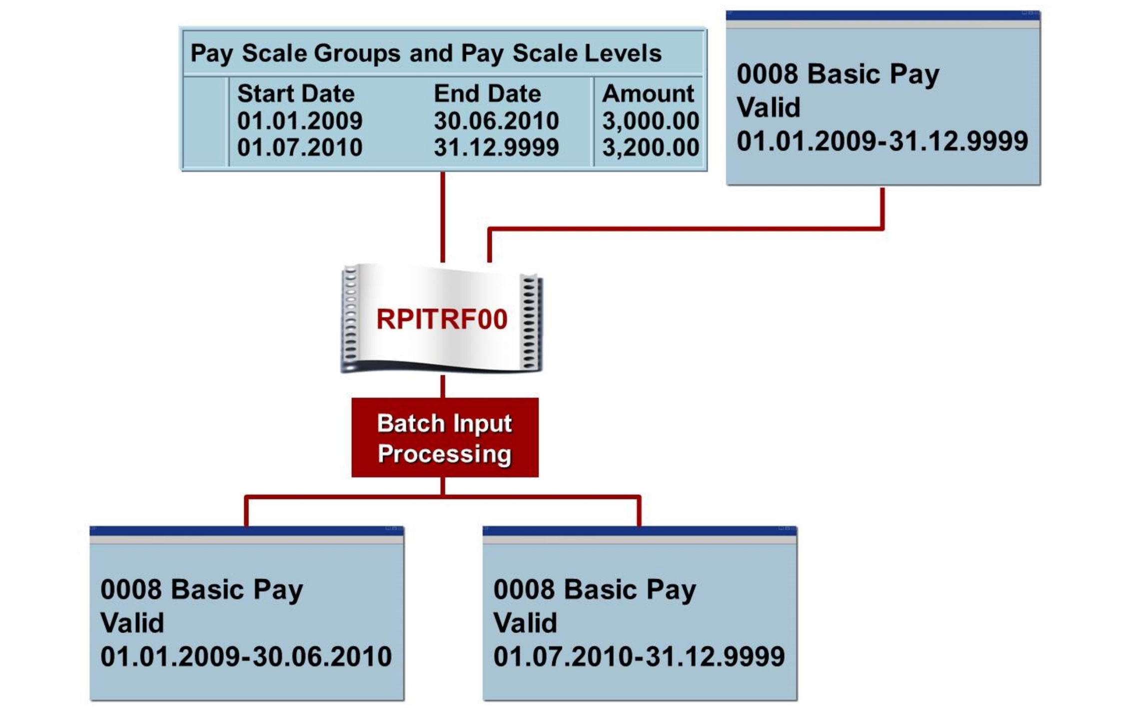


Figure 123: Performing an Enhanced Standard Pay Increase

You can use the RPITRF00 report to generate a basic pay history for a specific period of time.

Batch Input Processing

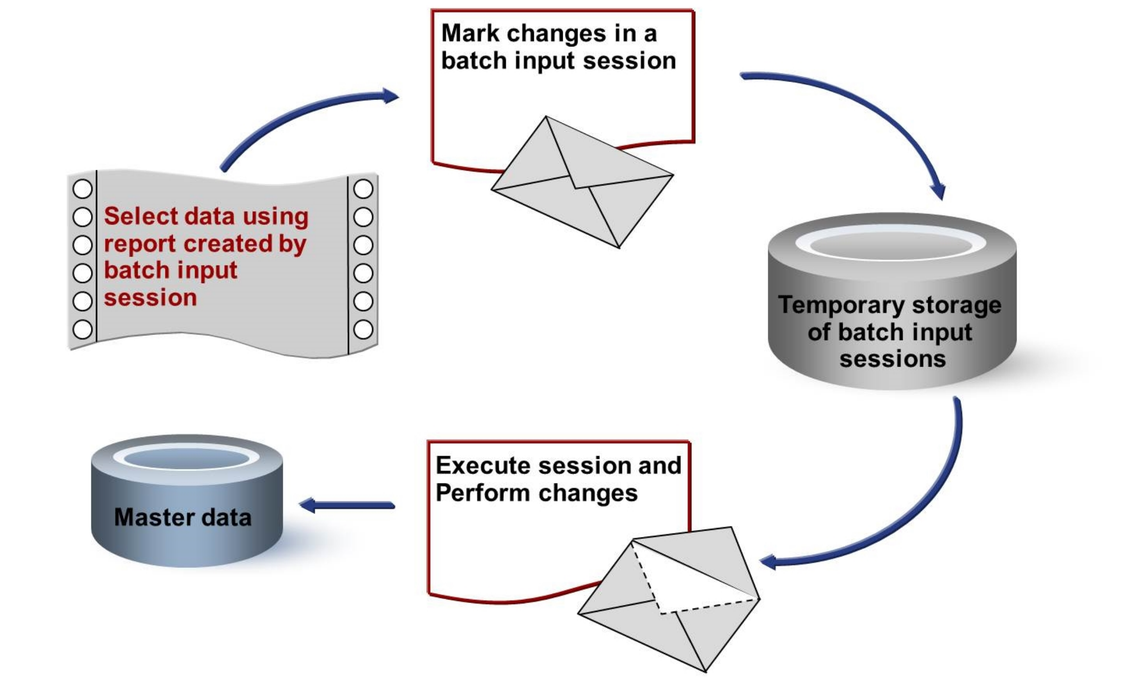


Figure 124: Batch Input Processing

Mass data changes that are triggered by reports are normally made using a batch input session and not immediately. The changes are not made to the master data until the batch input session has been processed.

To call the initial screen for the batch input system, choose *System* → *Services* → *Batch Input* → *Sessions* .

You can then select a session using any combination of the following criteria:

- Session name
- Creation date (according to session overview)
- Session status

Choose *Overview* to display the session overview. You can use the session overview to start, analyze, or delete sessions.

Choose *Log* to display the session log. When each session is processed, a log is automatically created. You can use the list of session logs to carry out additional actions, for example, to analyze sessions.

You can choose from the following three types of processing options:

Process online:

With this option, you can correct transactions interactively and run transactions that you have not yet executed in phases.

Only display errors:

The only display errors processing type is similar to processing online; the only difference is that you cannot process transactions that are free of errors and have not been executed interactively. The system displays the screen on which the error occurs.

Background:

The background processing type schedules a session to be processed immediately in the background.

LESSON SUMMARY

You should now be able to:

- Perform a standard pay increase

Unit 12
Lesson 2

Performing a Pay Scale Reclassification

LESSON OVERVIEW

This lesson shows you how to process changes to remuneration by performing a pay scale reclassification.

Business Example

As a personnel administrator, you are required to track changes in the remuneration and pay structure. When the employees have been in a pay scale level for a year, they are eligible for a reclassification to the next level. You need to perform a pay scale reclassification. For this reason, you require the following knowledge:

- An understanding of different aspects involved in a pay scale reclassification
- An understanding of pay scale reclassifications based on master data, and pay scale reclassifications based on working time

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Execute the update of pay scale reclassifications

Pay Scale Reclassification

Pay scale reclassification refers to the transfer of an employee from one pay scale group or pay scale level to another. The employee is then paid according to the new group or level.

Pay scale reclassification allows you to update the information on the pay scale groups and levels in the *Basic Pay* infotype (0008) for each employee. The system updates this information automatically when a situation meriting reclassification arises.

You can define limit values for the *Next Increase* field in the *Basic Pay* infotype (0008) and the *Key Date* field on the *Report Selection* screen.

In addition, you can define limit values for reclassification criteria in the SAP system for the following:

- The age of the employee when the system is to perform a pay scale reclassification.
- The pay scale group or level: when an employee reaches this group or level, and he or she is due for reclassification.
- The limit value for the time worked by the employee (in hours).

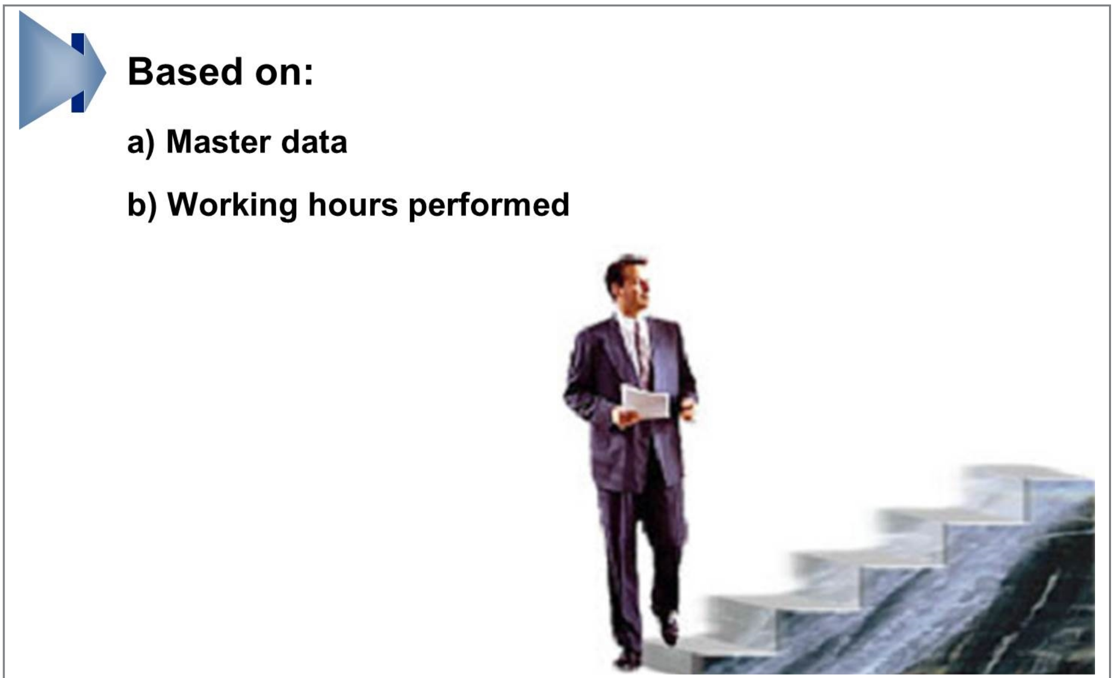


Figure 125: Pay Scale Reclassification

You can use the following reports to perform pay scale reclassification:

- Report RPIPSR00 (Pay scale reclassification based on master data): Pay scale can be classified based on master data according to the age or pay scale membership period.
- Report RPIPSR00 (Pay scale reclassification based on hours worked): Pay scale can also be reclassified based on number of hours worked by an employee.

Pay Scale Reclassification on the Basis of Master Data

Automatic pay scale reclassification depends on the employee's age and the time spent in a pay scale group or level.

Pay scale group	Pay scale level	Pay scale jump due to age	Group membership period	Next pay scale group	Next pay scale level
GR00	01		12 months	GR00	02
GR00	02		12 months	GR00	03
E11	01	40		E11	02
E11	02	45		E11	03

Figure 126: Pay Scale Reclassification on the Basis of Master Data

If you want to transfer an employee to a different pay scale group or level before the set date, you can enter the new date in the *Next increase* field of the *Basic Pay* infotype (0008).

Performing a Pay Scale Reclassification Based on Master Data

If you want to transfer an employee to a different group or level on the basis of age, you can enter a natural or technical date of birth to vary the time of reclassification.

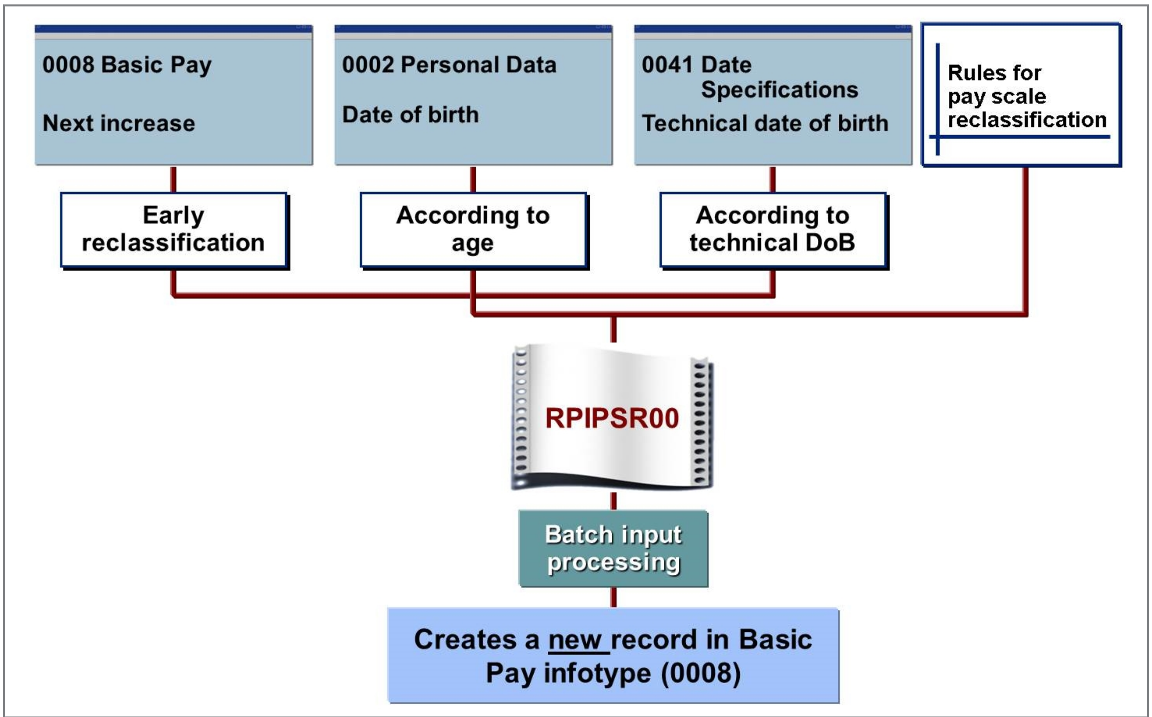


Figure 127: Performing a Pay Scale Reclassification Based on Master Data

The report RPIPSR00 (Time Spent in Each Pay Scale Area or Type or Group or Level) generates a list of employees, including their pay scale structure and additional information. You must perform pay scale reclassifications before a standard pay increase.

> Note:
> You usually perform pay scale reclassifications before the payroll run for each payroll period.

Pay Scale Reclassification Based on Working Time

You can only use the Pay Scale Reclassification Based on Working Time function if you use the Time Evaluation component.

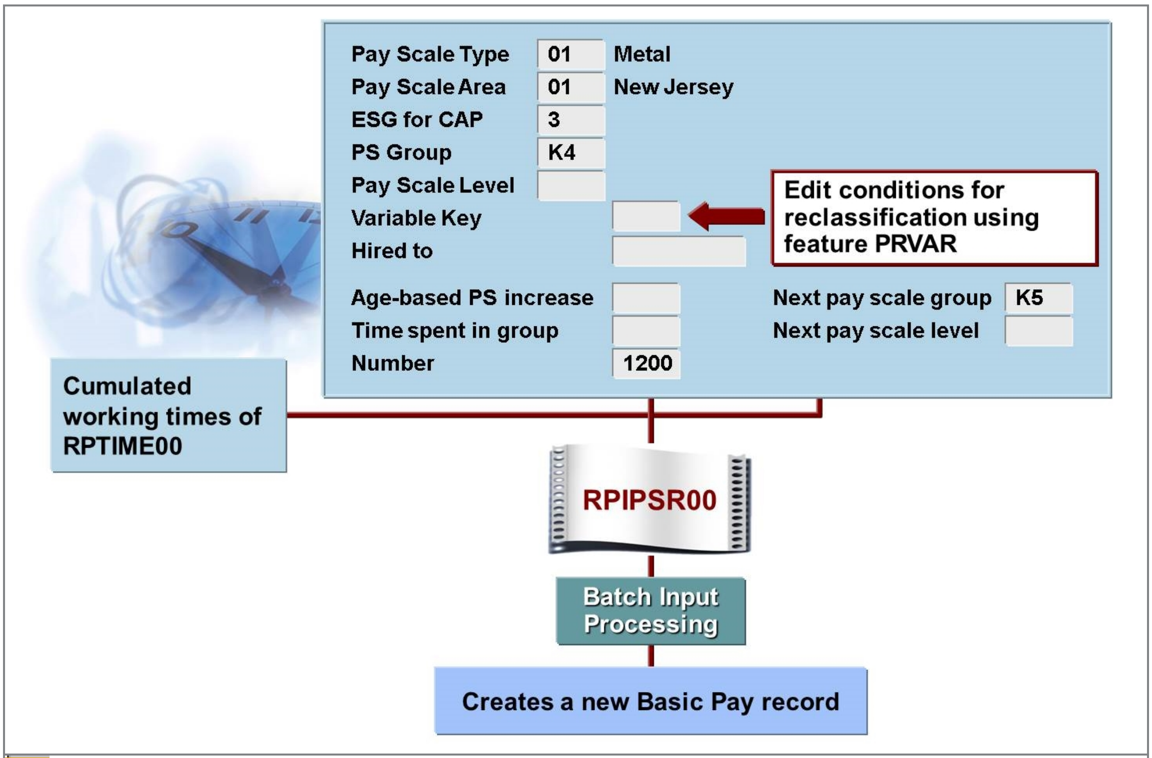


Figure 128: Pay Scale Reclassification Based on Working Time

Before you can use this function, you must define limit values for the hours worked by your employees, as well as the next pay scale group and level in the Pay Scale Reclassification table.

The pay scale reclassification report, RPIPSR00, compares the limit values for hours worked with the working time that has already been cumulated (RPTIME00). If the limit values are exceeded, this report creates a new *Basic Pay* record (0008).

The PRVAR feature uses additional organizational and employee-related criteria to define a three-character alphanumeric return code as a variable key. The system uses this key to read the pay scale reclassification table.

LESSON SUMMARY

You should now be able to:

- Execute the update of pay scale reclassifications

Learning Assessment

1. Mass data changes that are triggered by reports are normally made using a batch input session and not immediately. The changes are not made to the master data until the batch input session has been processed.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. Which of the following statements hold true for simple standard pay increase?

   Choose the correct answers.

   - [ ] A It creates a new infotype record.
   - [ ] B A change is made to a Customizing table.
   - [ ] C Retroactive accounting recognition is not automatically triggered.
   - [ ] D Running report RPU51000 will change the pay scale groups and levels on the key date.

3. To facilitate the processing of a standard pay increase, the activities for changing Customizing settings and master data are kept separate.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

4. Automatic pay scale reclassification may depend on the employee's age and the time spent in a pay scale group or level.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

5. Which of the following statements hold true for *Pay Scale Reclassification?*

   Choose the correct answers.

   - [ ] A You can define limit values for the Next Increase field in the *Basic Pay* infotype (0008).
   - [ ] B It refers to the assignment of an employee from one pay scale group or pay scale level to another.
   - [ ] C Automatic pay scale reclassification may depend on both the employee's age and time spent in a pay scale group or level.
   - [ ] D The *Basic Pay* Infotype (0008) is not updated due to pay scale reclassification.

6. You can define limit values for reclassification criteria in the SAP system, for which of the following?

   Choose the correct answers.

   - [ ] A The age of the employee when the system is to perform a pay scale reclassification.
   - [ ] B The previous Company experience of the employee.
   - [ ] C The pay scale group or level when an employee reaches this group or level, and he or she is due for reclassification.
   - [ ] D The limit value for the time worked by the employee (in hours).

Learning Assessment - Answers

1. Mass data changes that are triggered by reports are normally made using a batch input session and not immediately. The changes are not made to the master data until the batch input session has been processed.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

2. Which of the following statements hold true for simple standard pay increase?

   Choose the correct answers.

   - [ ] A It creates a new infotype record.
   - [X] B A change is made to a Customizing table.
   - [X] C Retroactive accounting recognition is not automatically triggered.
   - [X] D Running report RPU51000 will change the pay scale groups and levels on the key date.

3. To facilitate the processing of a standard pay increase, the activities for changing Customizing settings and master data are kept separate.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

4. Automatic pay scale reclassification may depend on the employee's age and the time spent in a pay scale group or level.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

5. Which of the following statements hold true for *Pay Scale Reclassification?*

   Choose the correct answers.

   [X] A You can define limit values for the Next Increase field in the *Basic Pay* infotype (0008).

   [X] B It refers to the assignment of an employee from one pay scale group or pay scale level to another.

   [X] C Automatic pay scale reclassification may depend on both the employee's age and time spent in a pay scale group or level.

   [ ] D The *Basic Pay* Infotype (0008) is not updated due to pay scale reclassification.

6. You can define limit values for reclassification criteria in the SAP system, for which of the following?

   Choose the correct answers.

   [X] A The age of the employee when the system is to perform a pay scale reclassification.

   [ ] B The previous Company experience of the employee.

   [X] C The pay scale group or level when an employee reaches this group or level, and he or she is due for reclassification.

   [X] D The limit value for the time worked by the employee (in hours).

UNIT 13 Infotypes

UNIT OBJECTIVES

- Locate the customization tables for infotypes
- Change the display of an infotype by adjusting the screen header
- Control the information displayed on infotype screens
- Create an infotype menu for master data entry screens

Unit 13
Lesson 1

Evaluating Infotype Attributes

LESSON OVERVIEW

This lesson shows you how to manage infotype controls and locate infotype attributes.

Business Example

As a personnel administrator, you are required to maintain employee information. This information is stored in pre-defined infotypes. One of your responsibilities is to control how the information is displayed on the infotypes. For this reason, you require the following knowledge:

- An understanding of how to locate infotype attributes
- An understanding of how to configure infotypes
- An understanding of infotype controls

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Locate the customization tables for infotypes

Infotype Attributes

Before discussing infotype attributes, you need to understand what user controls are.

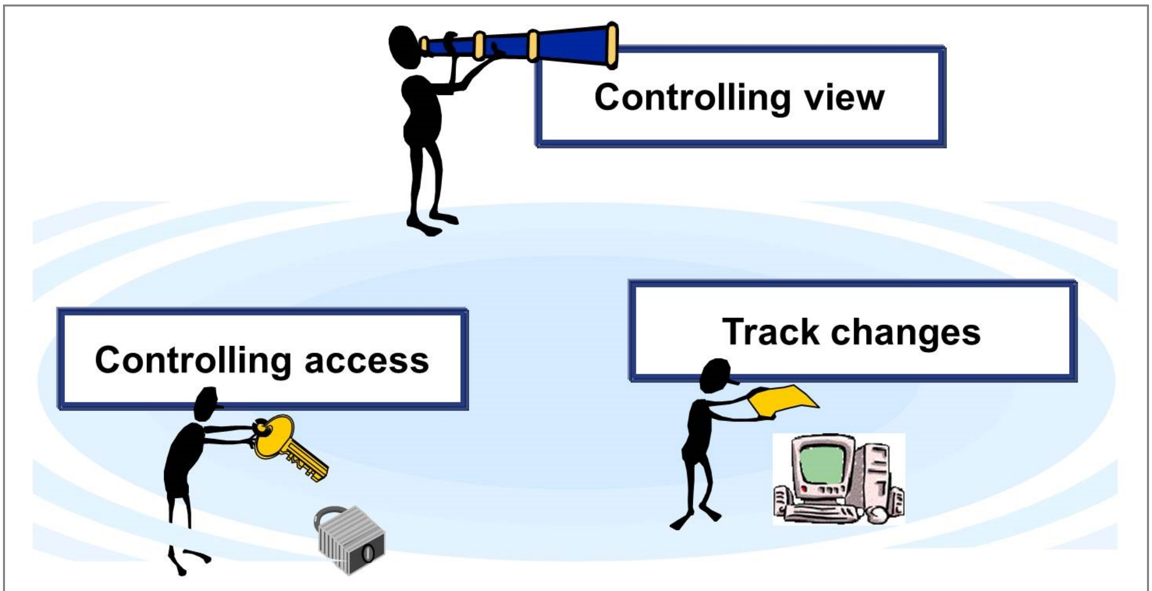


Figure 129: User Controls

Following are the different levels of user control:

Controlling view:

The first level of control is the controlling view. This level helps control what the user sees on the screen and menus, and what information is readily and easily available for the user to view. Additionally, there are controls that help decide appropriate information for data entry pertaining to certain employees, for example, country-specific infotypes.

Controlling access:

The second level of control, controlling access, helps provide authorizations. This level helps control what the user can access.

Track changes:

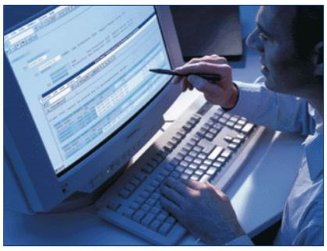
The third level of control, track changes, helps track what changes are made or what reports are run.

> Note:
> For more information on the controlling access level, refer to the HR940 course.

Classification of Infotype Attributes

Infotype

RP_0002	P0002	PA0002				
00030500	1	01011970	31129999			
Adams	Marcus	XY	XY	1	3	HE
2000	3000	03	X			



Screen View

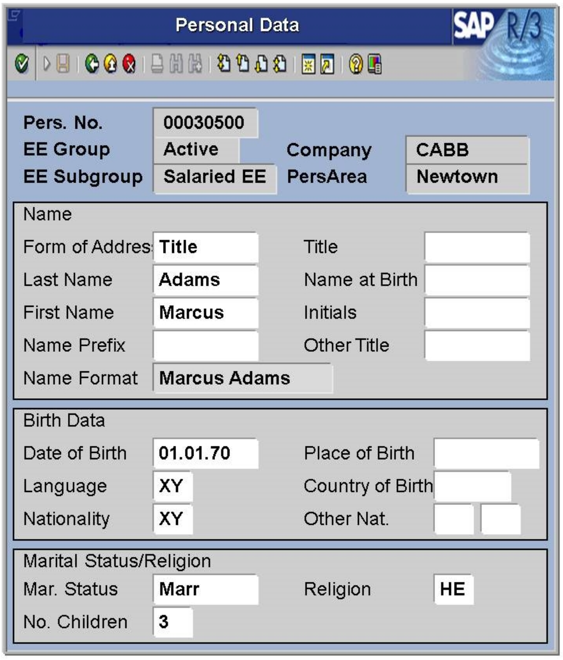


Figure 130: Infotype Attributes

Infotype attributes can be classified into the following categories:

Infotype

- Is a set of data grouped together into areas with similar content; for example, personal data, planned working time, organizational assignment, and basic pay
- Has a structure that reflects a data grouping and can be identified by a four-digit key
- Is a carrier of system control features such as time constraints and retroactive accounting relevance

Screen view

- Is used as an input template by users for maintaining infotype records
- A screen (or DYN amic PRO gram) consists of a screen and the accompanying flow logic

Following are the main elements of a screen:

- Attributes (for example screen number, following screen)
- Layout (the arrangement of texts, fields, and other elements)
- Field attributes (definition of the properties of individual fields)
- Flow logic (calls the relevant ABAP modules)
- In the ERP 6.0 system, a specific screen may consist of data from one, two, or several infotypes

Configuration of Infotypes

Data fields containing HR master data, time management data, and applicant data are grouped together for creating infotypes.

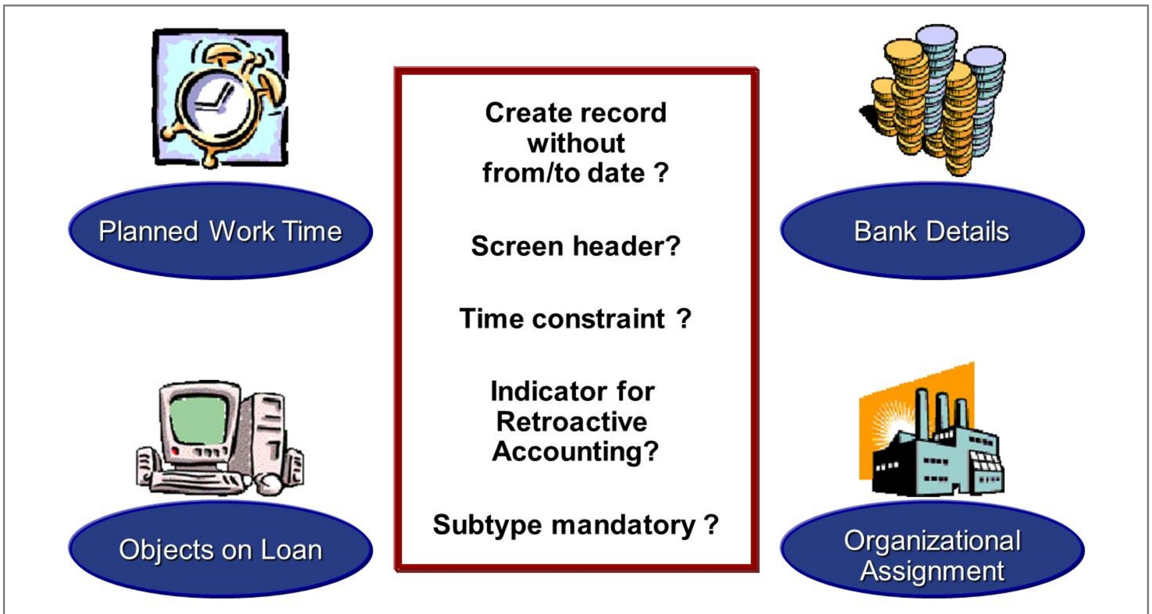


Figure 131: Configuring Infotypes

Infotypes are subject to the following naming conventions:

- Infotypes 0000–0999 are available for HR master data and certain applicant data.
- Infotypes 1000–1999 are available for HCM planning data.
- Infotypes 2000–2999 are available for time management data.
- Infotypes 3000-3999 are available for the Production Planning Cycle (PPC).
- Infotypes 4000–4999 are available for applicant-only data.
- Infotypes 5000-7999 are available for Web-Based applications.
- Infotypes 9000–9999 are reserved for customers.

You can assign the system response for each individual infotype. Information on dialog control, sort sequence, and header layout can be specified for each infotype.

Infotype Controls

The SAP standard system contains all infotypes and their default settings. These are referred to as infotype controls.

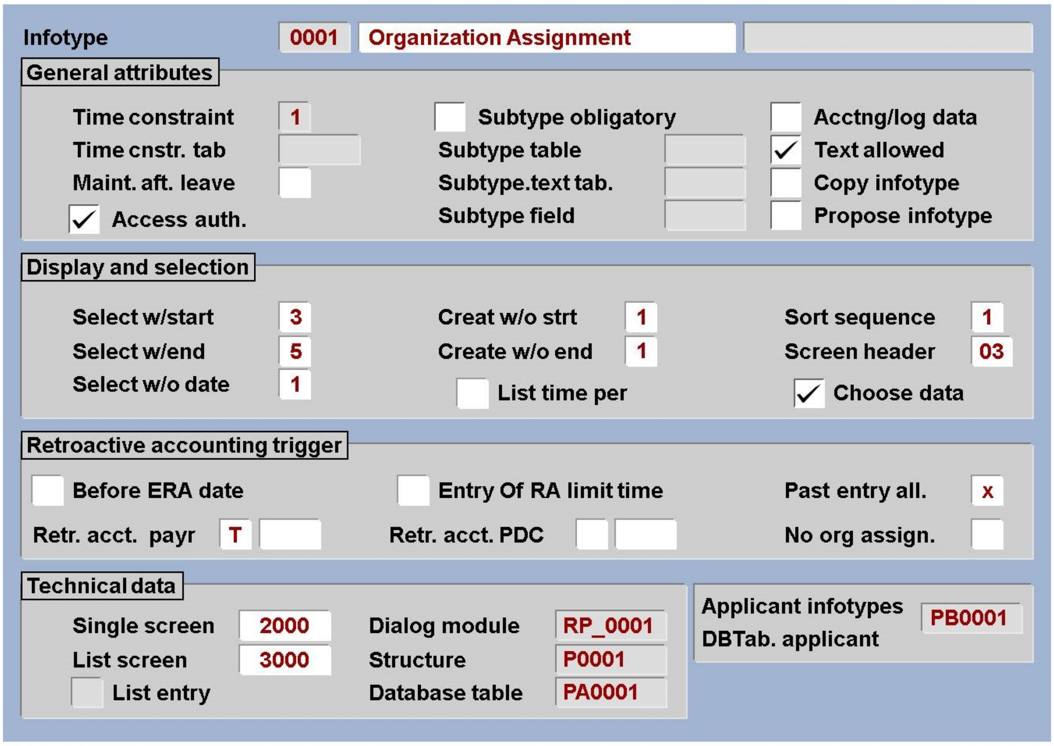


Figure 132: Infotype Control

If you adapt the system to meet your specific requirements, you must make a distinction between the following:

- Customer parts that you may customize
- SAP parts that you may not change under any circumstances

Retroactive Accounting

You can define the retroactive accounting relevance of infotypes for payroll and time management. The retroactive accounting relevance indicates whether or not the infotype would trigger retro for payroll and time management.

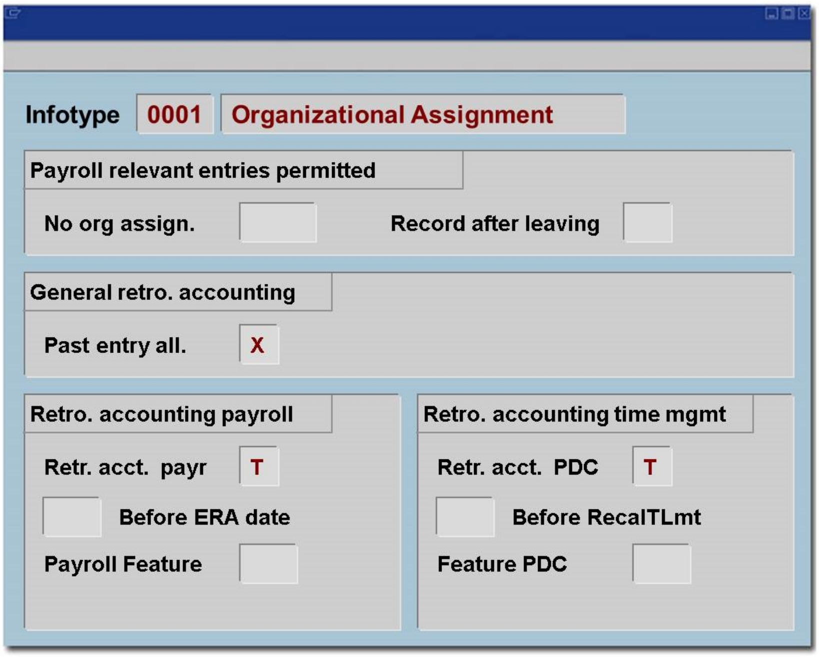


Figure 133: Defining Fields Relevant for Retroactive Accounting

Retroactive Accounting Infotype and Field Triggers

You can define relevant infotypes for retroactive accounting in the customizing step Define Fields Relevant for Retroactive Accounting in the following ways:

When an Infotype is Not Relevant for Retro

You can make the settings for payroll and time management entirely independent of one another. If you set an infotype as relevant for field-dependent retroactive accounting, you must list the fields of the infotype in the *Field-Dependent Retroactive Accounting Recognition* view.

An infotype can be defined in terms of a field as relevant for retroactive accounting with *Field-Specific Retroactive Accounting Attributes* .

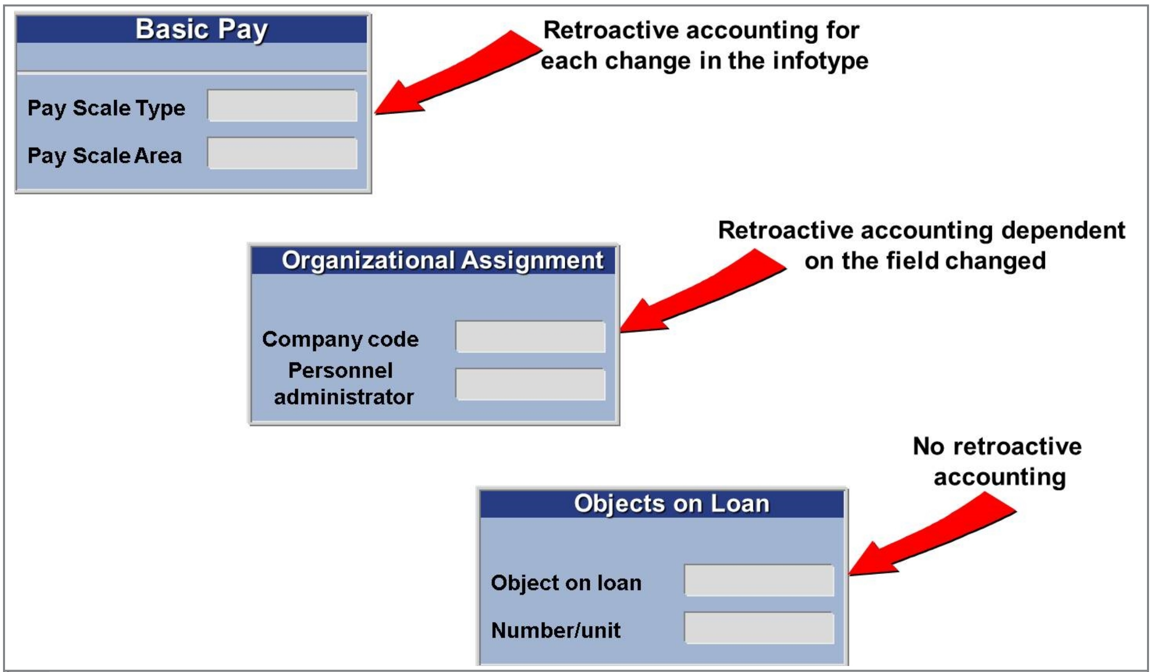


Figure 134: Retroactive Accounting Infotype and Field Triggers

Field-Specific Retroactive Accounting

You can indicate infotypes or infotype fields as relevant for retroactive accounting. Fields (T) can be indicated as relevant for retroactive accounting.

If the relevance for retroactive accounting for the payroll field was set to *T* (*field-dependent*), you must list the fields which trigger the retroactive run for the payroll in the *Field-Dependent Retroactive Accounting Recognition* view.

Enter the value 1 for these fields in the *Type* field. If the Retroactive accounting relevance for PDC time evaluation field is set to *T* (field-dependent), you must list the fields which trigger retroactive accounting of time data in the *V_T588G* view. Enter the value 2 for these fields in the *Type* field. You can choose the *Cannot be changed in the payroll past* setting for certain fields. Such a setting could, for example, be used for transfer data since a retroactive change for such data would not make any sense.

Country-Specific Infotypes

You can specify the permissibility of infotypes for countries.

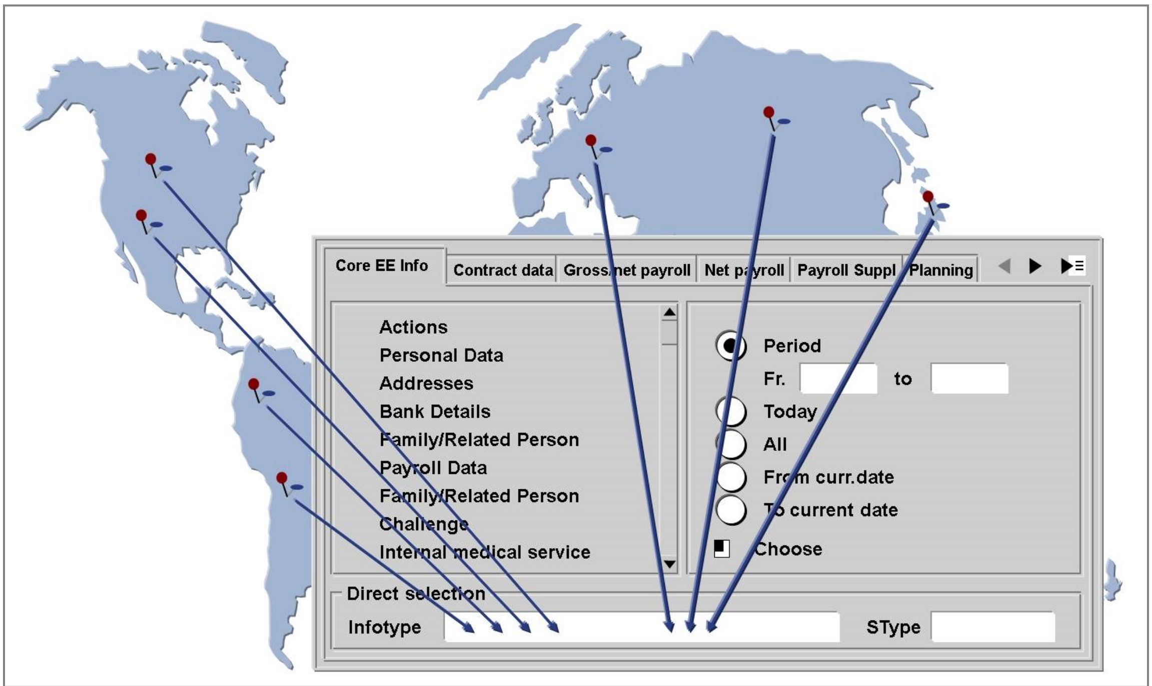


Figure 135: Country-Specific Infotypes and Subtypes

If the country-dependent subtype indicator is set for the infotype, you can also specify the permissibility of subtypes for an infotype for countries.

Currently, this indicator can be reported only for infotypes whose subtypes are defined in *the Info-subtype attributes* view.

In the *Display Personnel Master Data* (PA20) and *Maintain Personnel Master Data* (PA30) transactions, the infotypes with a country grouping of personnel numbers are checked. This means that only the infotypes and subtypes which are approved for country groupings are displayed in the *Infotypes - Country-Specific Settings* view.

For example, infotype 0224 stands for the *Canadian Taxation* infotype and is identified as exclusively valid for Canada in the configuration. If an existing personnel number is entered in the *personnel number* field in the *Maintain Master Data* view, the system determines whether or not the employee belongs to a Canadian company code (based on record IT0001). If the employee does not belong to a Canadian Company code, infotype 0224 cannot be maintained and will not be visible in the pull-down selection for infotypes.

LESSON SUMMARY

You should now be able to:

- Locate the customization tables for infotypes

Unit 13
Lesson 2

Customizing Screen Headers

LESSON OVERVIEW

This lesson shows you how to modify screen headers for an infotype.

Business Example

As the personnel administrator, you are responsible for the maintenance of employee information on infotypes. Part of your responsibility is to maintain infotype screen headers. Each infotype is assigned a screen header which controls the information displayed at the top of the infotype record. For this reason, you require the following knowledge:

- An understanding of screen headers

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Change the display of an infotype by adjusting the screen header

Screen Headers

The screen header consists of the first three lines in single screens and list screens .

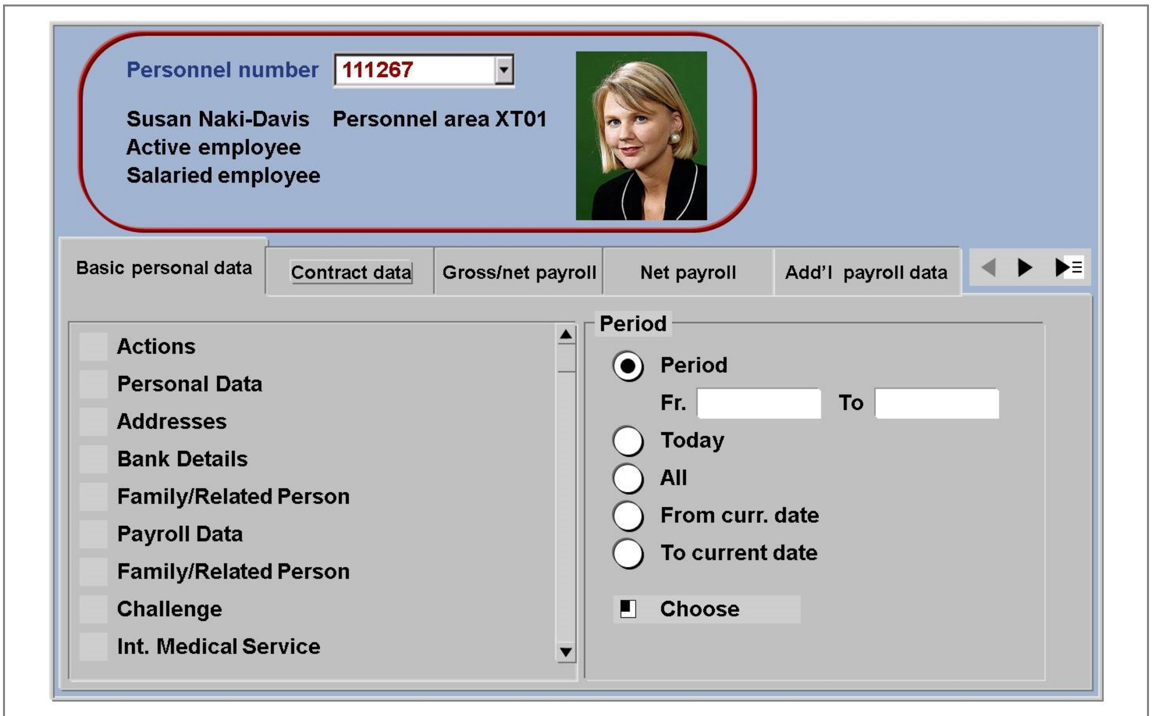


Figure 136: Customizing the User Interface: Screen Headers

In the standard ERP system, a screen header is already assigned to each infotype. The system also contains information about whether the data for the system date or the start date of the

Organizational Assignment infotype is valid. Each screen header is assigned a modifier that is dependent on the transaction class (A = Personnel Administration, B = Recruitment).

You can change the first three lines of the screen header.

In Release 4.5 and later versions, data can be displayed from all infotypes, including customer infotypes, in the screen header.

In addition to infotype fields, you can also include passport photos of your employees in the *Infotype Header Definition* view. To do this, determine the document type in the system table (T77S0) that you want to use to create passport photographs in the visual archive.

Header Modifier

A screen header is already assigned to each infotype. In addition to the country grouping and transaction class, a header modifier is also assigned to each screen header. A header modifier defines the structure of the header.

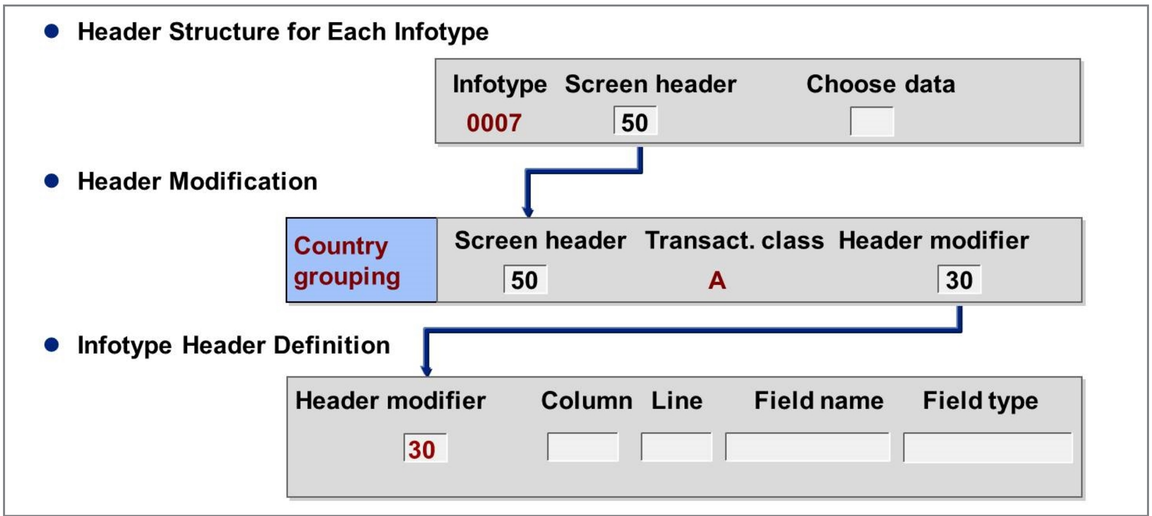


Figure 137: Customizing the User Interface: Header Definition

In the *Header Structure for Each Infotype* view, a header is already assigned to each infotype.

The *Choose data* indicator is used to determine when the data is selected from the various infotypes used for creating the infotype header.

This is done in the following ways:

- If you set the *Choose Data* indicator, the data that is valid on the start date of the infotype record which is currently being processed or displayed, is used to create infotype headers.
- If you do not set the *Choose Data* indicator, the data that is valid for the system date is used for creating infotype headers.

Depending on the transaction class (A = Personnel Administration, B = Recruitment) and the country grouping, a header modifier is assigned to this infotype header in the *Header Modification* view (V_T588I).

In the *Infotype Header Definition* view, specify the names and positions of the field contents that are to be displayed in the header. The field type controls how the fields are formatted when used in infotype headers.

Once all table entries are created, save them. The */ 1PAPAXX/HDR_mmmnnc* reports are then generated, where mmm, nn, and c are – respectively – the client, the header modifier, and the transaction class.

LESSON SUMMARY

You should now be able to:

- Change the display of an infotype by adjusting the screen header

Unit 13
Lesson 3

Modifying Infotype Screens

LESSON OVERVIEW

This lesson shows you how to modify the screen for an infotype.

Business Example

As a member of the HR project team, you are responsible for modifying the screens used to display infotypes. For this reason, you require the following knowledge:

- An understanding of infotype screen modifications

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Control the information displayed on infotype screens

Infotype Screen Modification

For some infotypes, different entry screens are delivered.

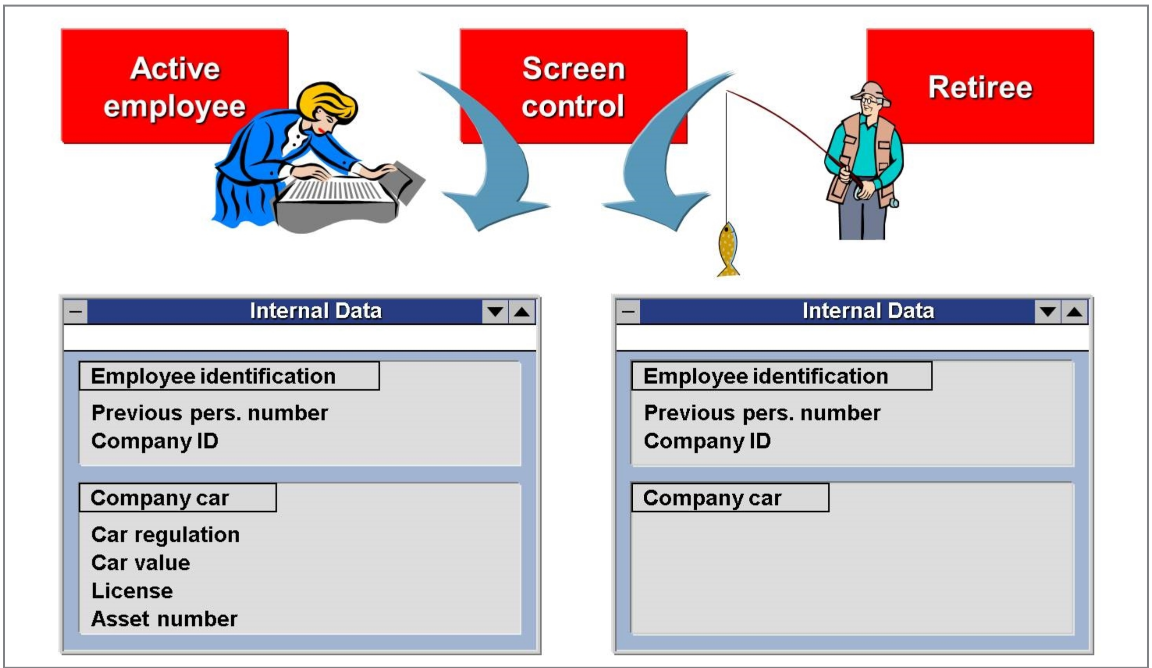


Figure 138: Customizing the User Interface: Screen View

These alternative screens are preset by SAP according to the transaction class and country grouping. Different screens can be used for different transaction classes (for example “A” for employees and “B” for applicants) or country groupings.

You can also modify the attributes of the individual fields within a screen in the following ways:

- Define fields as mandatory fields.
- Hide all unnecessary fields.

You can also hide field attributes in line with certain employee control data.

The screen modification procedure is the same for employees and applicants.

To define the screen view, you must have the following information:

- Infotype module pool
- Screen number

To display this information, you can call the infotype maintenance transaction and choose *System* → *Status* .

Customizing the User Interface: Screen Modification

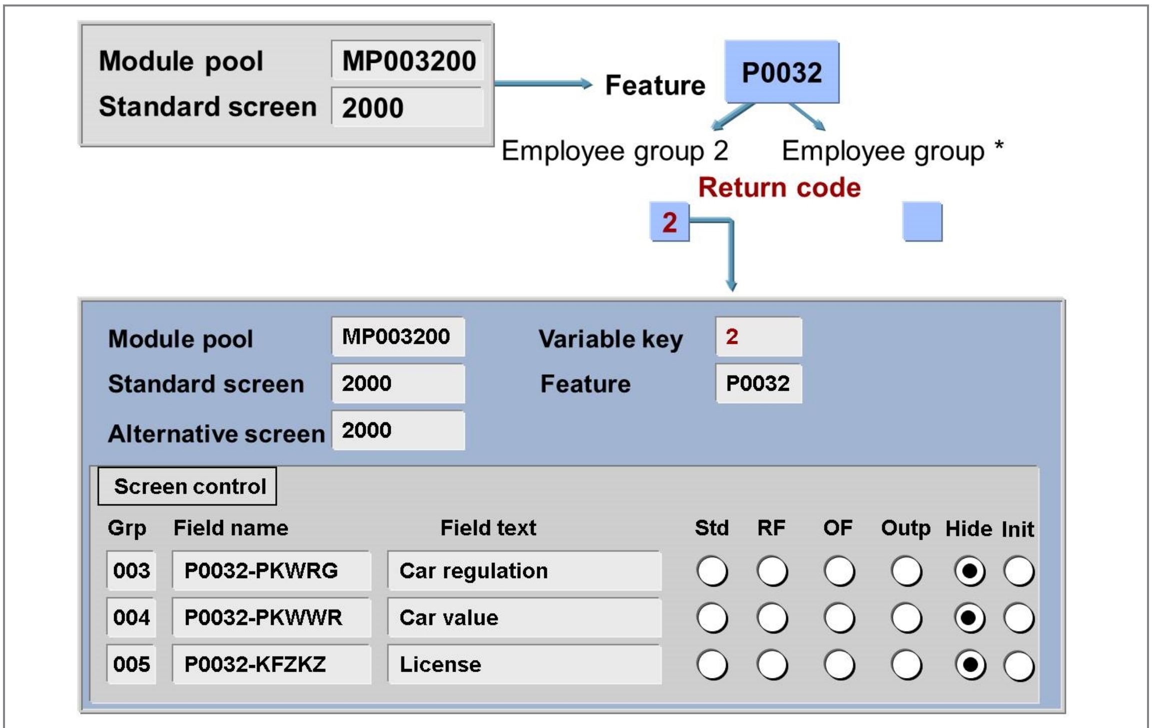


Figure 139: Customizing the User Interface: Screen Modification

You can change the attributes of the individual screen fields in the *Change Screen Modifications* activity. Find the entry for the current screen. On the detail screen, specify the fields that should be modified.

The following field attributes can be specified on the detail screen:

- *Standard*
- *Required*
- *Optional*
- *Not ready for input*

- *Hidden*

If you need a modified screen but cannot find an entry in this view, create a new entry for the screen, making sure that the *Variable key* field is empty.

If the screen modifications for infotypes are generally applicable, then you do not require a feature or any additional entries in this view.

In the example shown in the figure, the screen modification is based on the employee's organizational assignment. The modification is determined by the Pnnnn feature (where nnnn indicates the infotype number). If you do not enter a return value for the feature in the decision tree, the entry where the *Variable key* field remains empty is automatically valid. In other words, it is the basic entry or the basic screen. If no feature is available for the corresponding infotype, you need to create one.

Create a new entry with the return value in the variable key for each return value for the feature. Assign the number of an alternative screen, if necessary.

The screen modification in the detail screen now applies to the alternative screen.

LESSON SUMMARY

You should now be able to:

- Control the information displayed on infotype screens

Creating Infotype Menus

LESSON OVERVIEW

This lesson shows you how to create an infotype menu.

Business Example

As a member of the HR project team, one of your tasks is to enable users to easily access employee information using infotype menus. In order to set up infotpe menus, you require the following knowledge:

- An understanding of infotype menus
- An understanding of menus for fast entry

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create an infotype menu for master data entry screens

Infotype Menus

Infotype menus allow you to select the required infotype for a certain personnel number from an infotype list and process it.

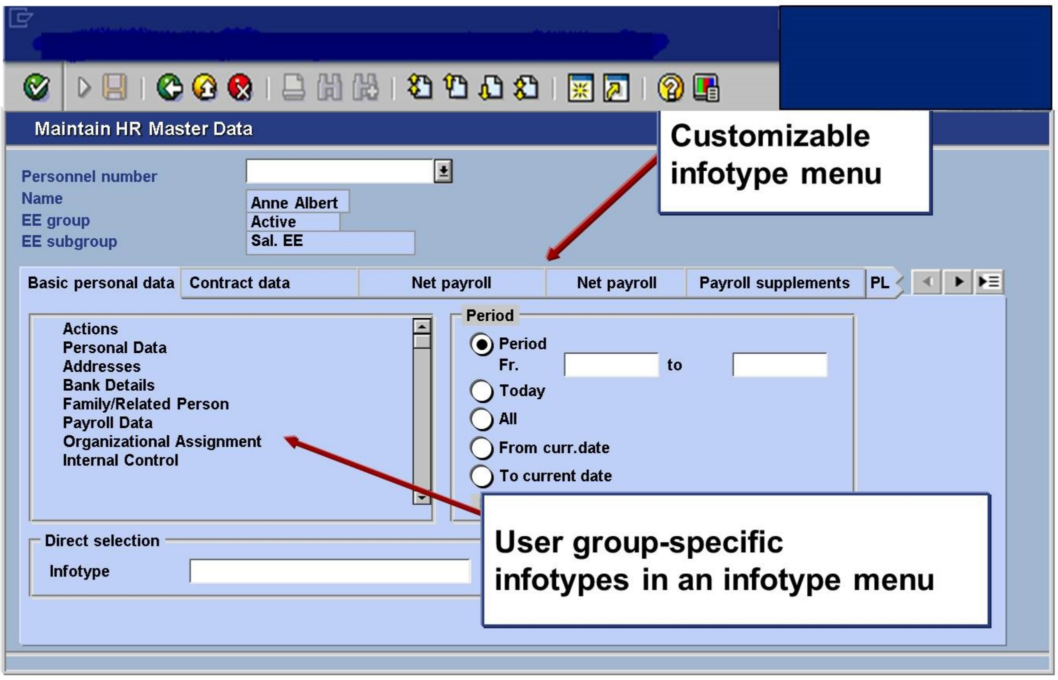


Figure 140: Infotype Menus

Within the infotype menus, you can change the menu sequence as follows:

- By defining user group-specific menus
- By changing the menu structure
- By inserting new menu options

Changing Infotype Menus

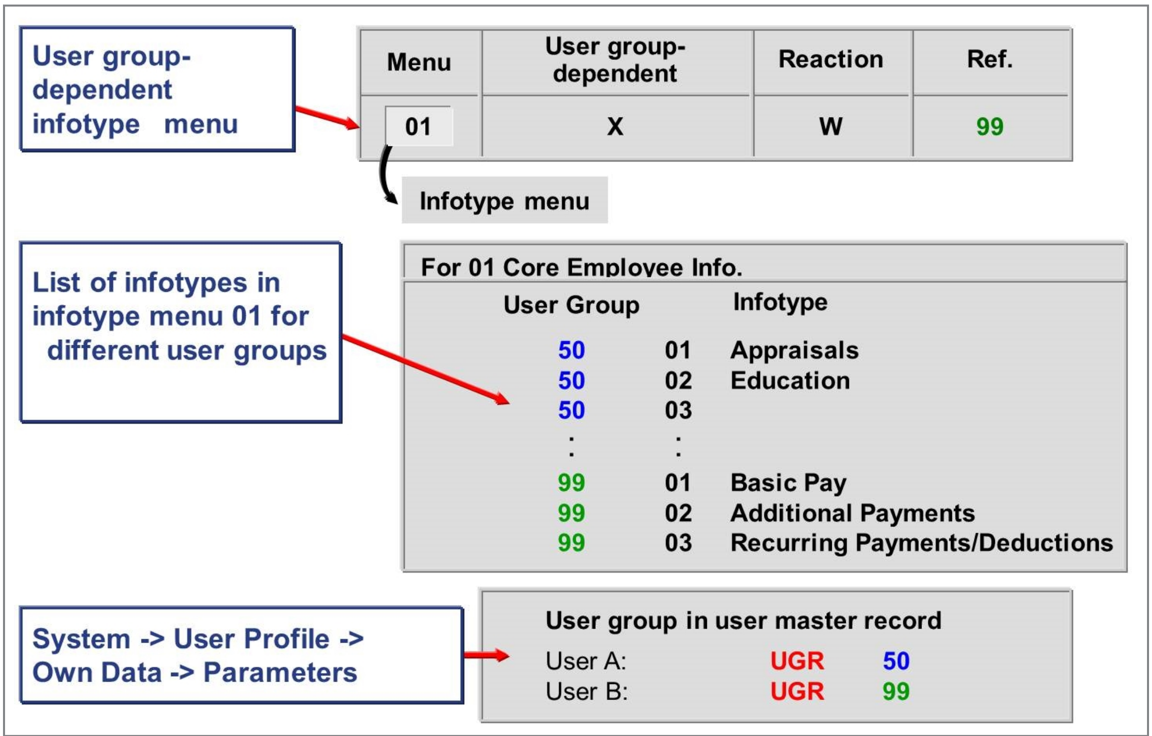


Figure 141: Changing Infotype Menus

The *Infotype Menu* customizing step guides you through the steps necessary to configure the information shown on each of the menu tabs.

The activities involved in configuring the choices on a menu tab include the following:

- Defining whether the menu is to be dependent on the user group
- Assigning the system response for the case where the user has not maintained the user group or where there are no entries in the menu
- Assigning a reference user group that can be used to set up the menu, if necessary

For the infotypes in the infotype menu, you need to do the following:

- Select the menu category I and the infotype menu.
- Copy the infotypes into the menu for the user group.

User Groups and Reference User Groups

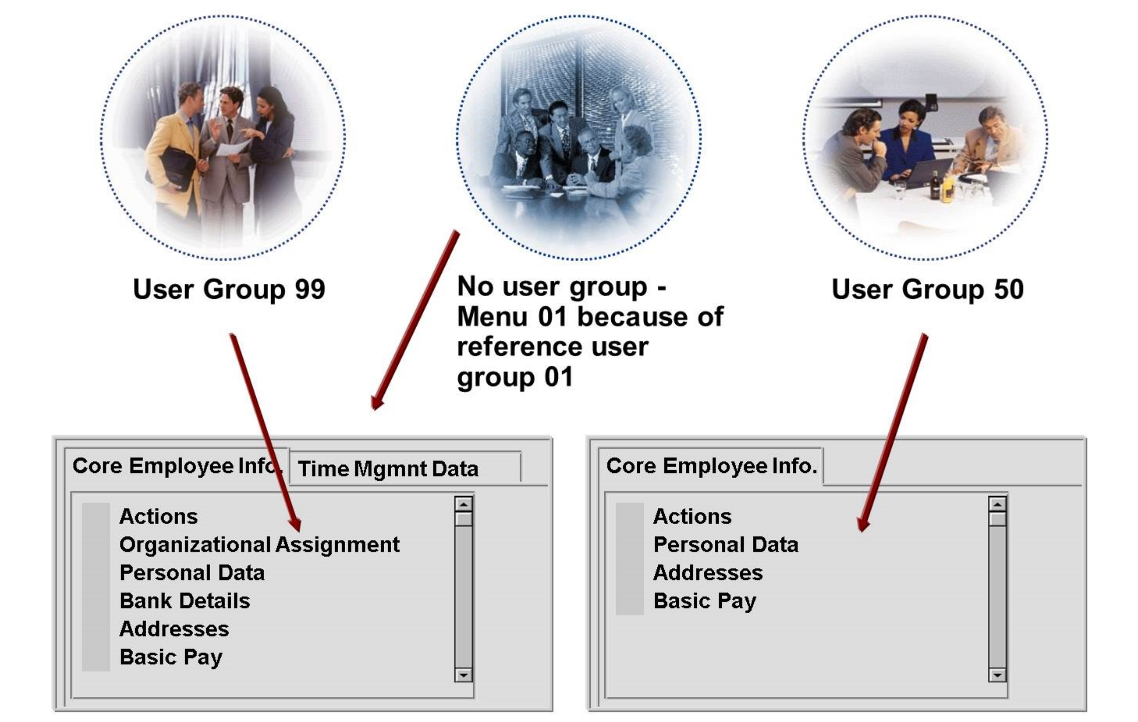


Figure 142: User Groups and Reference User Groups

To store different menus and personnel actions for different user groups or user parameters (UGR), you can use the menu control function . This means that you can adapt the system so that it meets the requirements of the individual users.

If your menu is user group dependent, enter a reference user group as well, with which the menu is to be created, if an administrator has not maintained the user group in his or her user master data. On this screen, you also specify the infotype sequence for the different user groups.

If you do not define your menu as user group dependent, you can only maintain the infotype sequence for the user group 00. This is valid for all users that select this menu.

Hierarchy for Building Infotype Menus

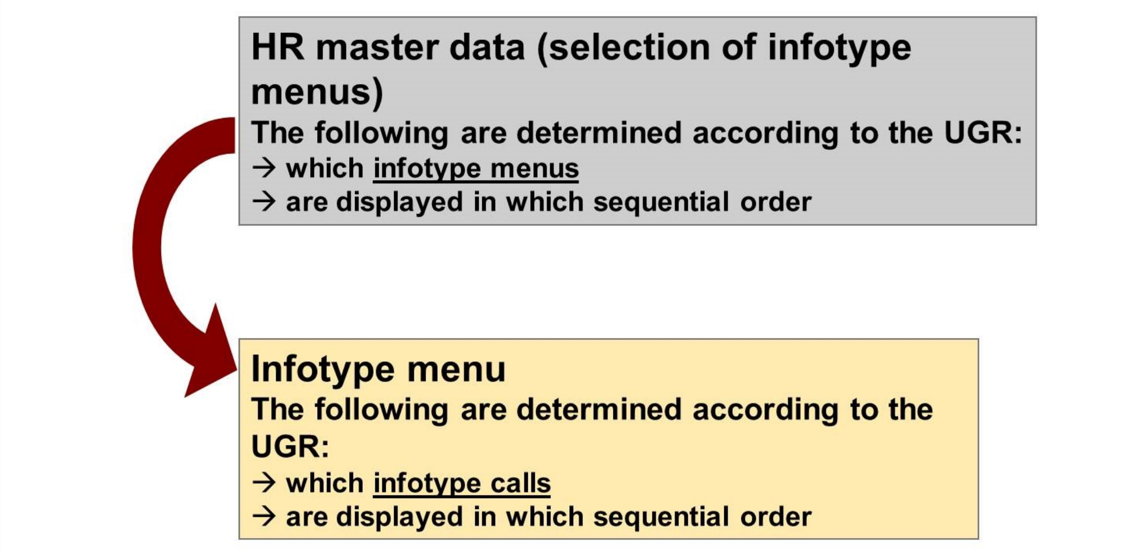


Figure 143: Hierarchy When Building Infotype Menus

In addition to describing the infotype menu area, you must also determine which infotype menus are displayed in the HR master data maintenance and display transactions.

While processing the HR master data, you determine the following according to the various user groups:

- Which infotype menus are displayed
- The sequential order in which the infotype menus are displayed

The relevant IMG activity is *Determine choice of infotype menus* .

HR Master Data

When the HR master data is maintained and displayed, you define the structure of the menu that appears within the master data. This structure can also be defined using the user groups or user parameter (UGR).

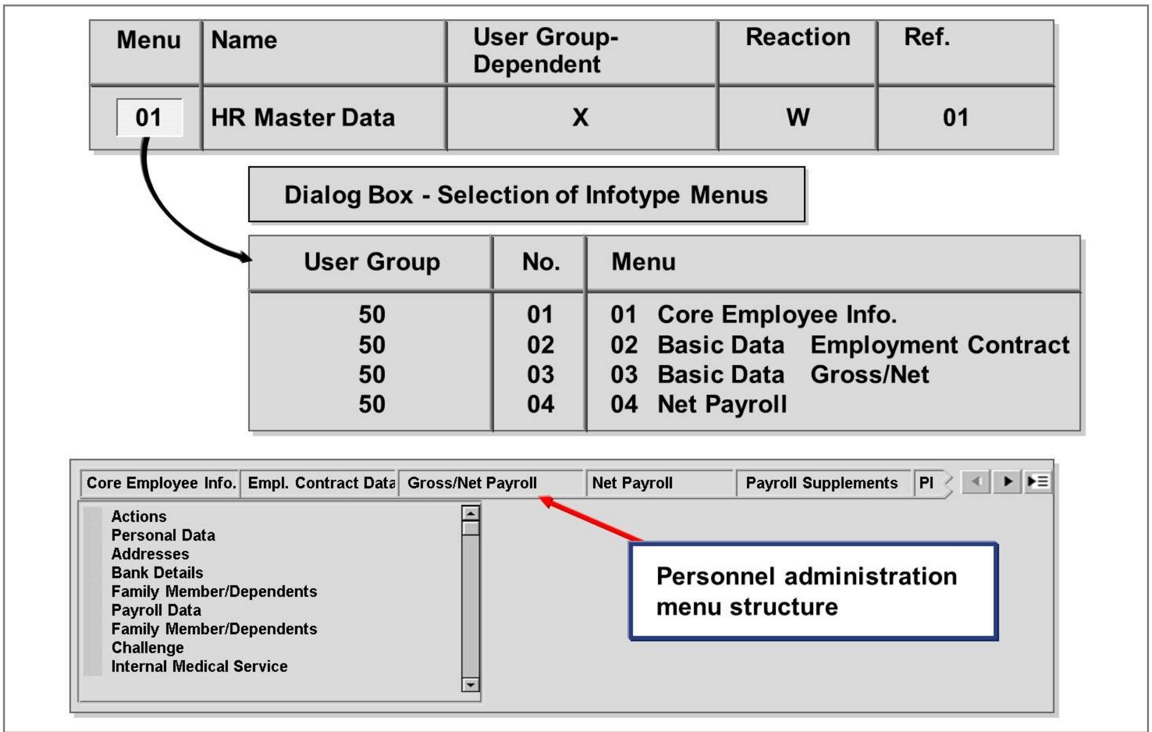


Figure 144: Defining the Selection of Infotype Menus

If no entry exists in the table for the user's user group, or if the user has not maintained his or her user group, the menu structure is determined using the reference user group.

For user group dependence for infotype menu selection, you perform the following steps:

1. Select the menu type *S* and *01 HR master data* menu for infotype menu selection.
2. Determine the user group dependence and the system response if the user has not maintained the user group or there are no entries in the menu.
3. Assign a reference user group with which the menu can be created.

For infotype menus for infotype menu selection, you perform the following steps:

1. Choose the menu type *S* and *01 HR master data* menu for infotype menu selection.
2. Extend the *01 HR master data* selection menu by accepting the newly created infotype menus for the respective user group.

Menus for Fast Entry

For fast entry menus, you can assign the following:

- An entry screen
- A default value screen
- A selection report to a fast entry menu option

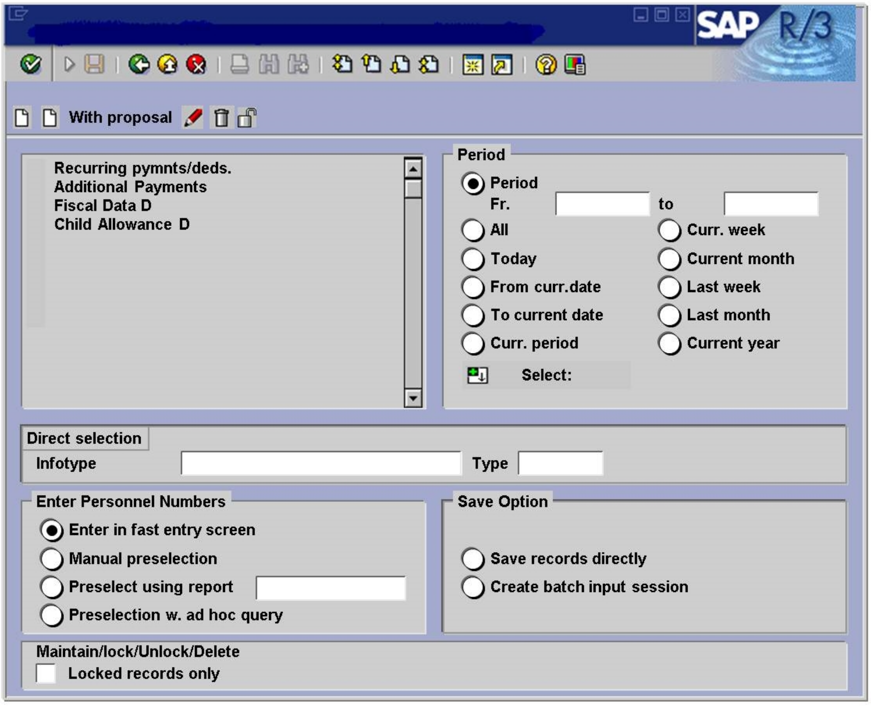


Figure 145: Menus for Fast Entry

Fast entry menus have the following prerequisites:

- If you want to change the infotype text, select the “Infotypes” customizing step, then the “Further Infotype Texts” activity, and enter a screen type for each infotype. This text can be accessed in the infotype menus.
- Set up the infotype menus for fast entry in the “Infotype Menu” step. The following infotype menus are predefined as standard settings for fast entry :

  07 Master Data Fast Entry

    (Dependent on the user group)

  09 Time Data Fast Entry

    (Dependent on the user group)

- Enter the corresponding screen type for your infotype (screen control field), so that the corresponding text is used.

In the Set Up Infotype Menu for Fast Data Entry step, you find the following activities:

Activities:

  Activities include selection reports for fast entry. If you use your own reports for personnel number selection in fast entry, you must ensure that these reports are allowed for all infotypes.

Screen types for fast entry:

  For each infotype and screen type (screen control), you must define the screen number for creating records with default values, the screen number for fast entry of several personnel numbers, and the reports for personnel number selection.

LESSON SUMMARY

You should now be able to:

- Create an infotype menu for master data entry screens

Learning Assessment

1. Which level controls what the user sees on the screen and menus, and what information is readily and easily available for the user to view?

   Choose the correct answer.

   - [ ] A Authorizations
   - [ ] B Controlling view
   - [ ] C Controlling access
   - [ ] D Track changes

2. What are infotypes 2000–2999 for?

   Choose the correct answer.

   - [ ] A HR master data and certain applicant data
   - [ ] B HCM planning data
   - [ ] C Applicant-only data
   - [ ] D Time management data

3. While defining relevant infotypes for retroactive accounting, the settings for payroll and time management can be made entirely independent of one another.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

4. In the Display Personnel Master Data (PA20) and Maintain Personnel Master Data (PA30) transactions, only the infotypes and subtypes which are approved for country groupings are displayed in the infotypes *Country-Specific Settings* view.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

5. The screen header consists of the first two lines.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

6. Transaction Class A applies to applicants.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

7. Which of the following options allows you to change the attributes of screen fields?

   Choose the correct answer.

   - [ ] A Alter screen modifications
   - [ ] B Change screen modifications
   - [ ] C Infotype header creation
   - [ ] D Add user interfaces

8. What are the activities involved in configuring the choices on an infotype menu?

   Choose the correct answers.

   - [ ] A Defining user group dependency
   - [ ] B Changing Actions menu
   - [ ] C Assigning a reference user group

9. All the users who maintain the same user group in their user profile would get the same infotype menus.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

10. If the user has not maintained any user group, the menu structure is determined using the reference user group.

    Determine whether this statement is true or false.

    - [ ] True
    - [ ] False

11. You can assign a default value screen for fast entry menus.

    Determine whether this statement is true or false.

    - [ ] True
    - [ ] False

Learning Assessment - Answers

1. Which level controls what the user sees on the screen and menus, and what information is readily and easily available for the user to view?

   Choose the correct answer.

   - [ ] A Authorizations
   - [x] B Controlling view
   - [ ] C Controlling access
   - [ ] D Track changes

2. What are infotypes 2000–2999 for?

   Choose the correct answer.

   - [ ] A HR master data and certain applicant data
   - [ ] B HCM planning data
   - [ ] C Applicant-only data
   - [x] D Time management data

3. While defining relevant infotypes for retroactive accounting, the settings for payroll and time management can be made entirely independent of one another.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

4. In the Display Personnel Master Data (PA20) and Maintain Personnel Master Data (PA30) transactions, only the infotypes and subtypes which are approved for country groupings are displayed in the infotypes *Country-Specific Settings* view.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

5. The screen header consists of the first two lines.

   Determine whether this statement is true or false.

   [ ] True

   [X] False

6. Transaction Class A applies to applicants.

   Determine whether this statement is true or false.

   [ ] True

   [X] False

7. Which of the following options allows you to change the attributes of screen fields?

   Choose the correct answer.

   [ ] A Alter screen modifications

   [X] B Change screen modifications

   [ ] C Infotype header creation

   [ ] D Add user interfaces

8. What are the activities involved in configuring the choices on an infotype menu?

   Choose the correct answers.

   [X] A Defining user group dependency

   [ ] B Changing Actions menu

   [X] C Assigning a reference user group

9. All the users who maintain the same user group in their user profile would get the same infotype menus.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

10. If the user has not maintained any user group, the menu structure is determined using the reference user group.

    Determine whether this statement is true or false.

    - [x] True
    - [ ] False

11. You can assign a default value screen for fast entry menus.

    Determine whether this statement is true or false.

    - [x] True
    - [ ] False

UNIT 14

Personnel Actions

UNIT OBJECTIVES

- Set up personnel actions to meet master data administration requirements
- Verify the status indicators of a personnel action
- Identify the reasons for using personnel action types
- Outline how multiple actions processed on the same day are tracked
- Configure personnel actions

Unit 14
Lesson 1

Creating Personnel Actions

LESSON OVERVIEW

This lesson explains the configuration and examples of personnel actions.

Business Example

In your company, employees receive a payment of EUR 200 when they have a baby. You want to set up a personnel action containing the relevant infotypes for this. For this reason, you require the following knowledge:

- An understanding of personnel actions
- An understanding of status indicators
- An understanding of the action menu

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Set up personnel actions to meet master data administration requirements
- Verify the status indicators of a personnel action
- Identify the reasons for using personnel action types

Personnel Actions

Personnel procedures, such as recruitment of an employee, organizational reassignment, or the procedure followed when an employee leaves the enterprise are represented by individual personnel actions.

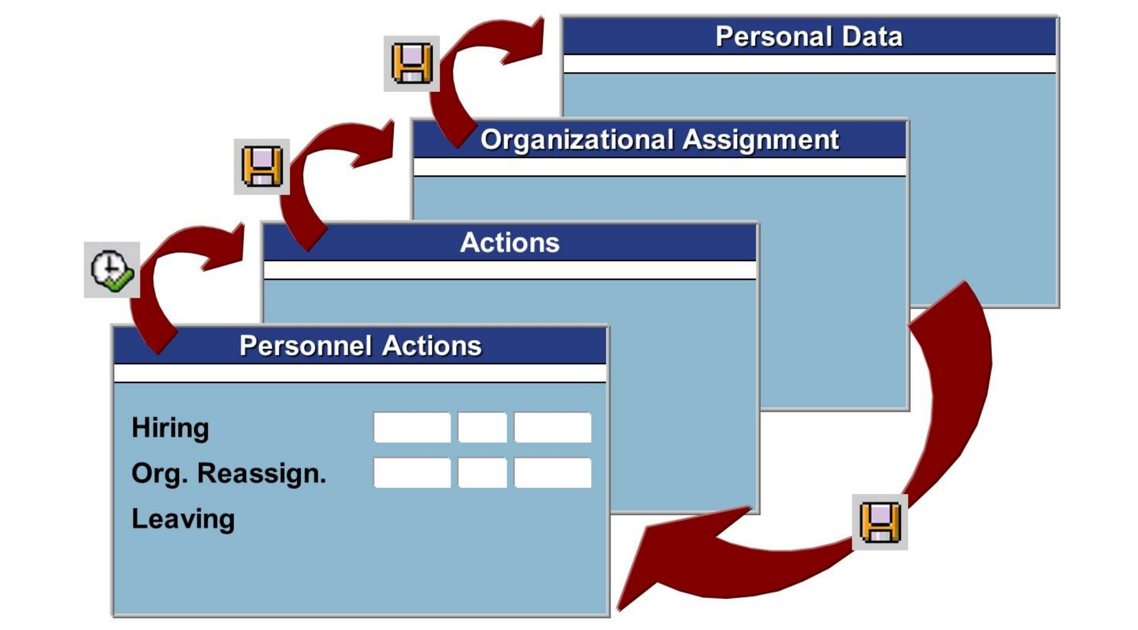


Figure 146: Overview: Personnel Actions

Actions facilitate the processing of complex personnel processes. The system displays all relevant infotypes in a sequence that has already been defined, so that you can maintain the necessary data.

Default Values for Infotypes

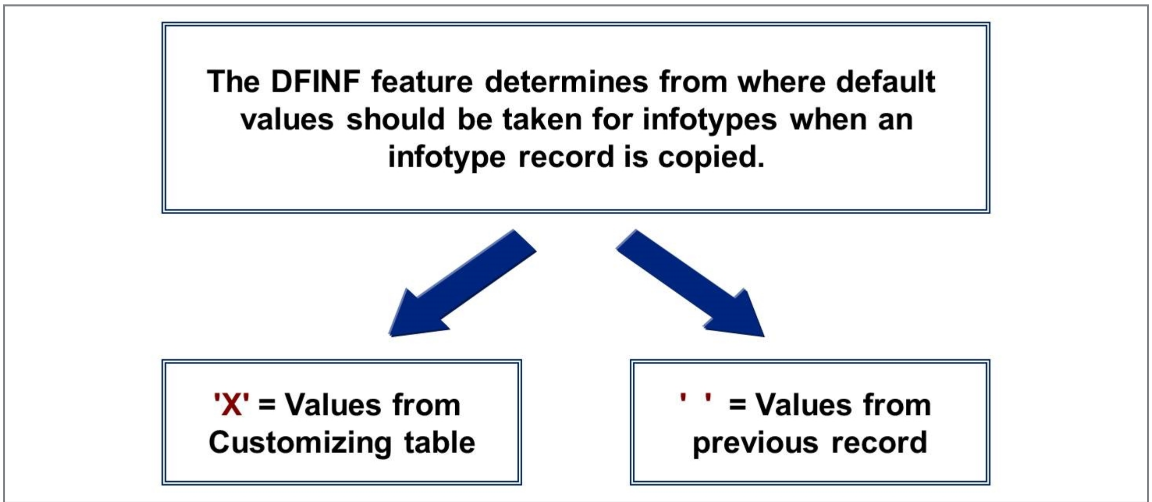


Figure 147: Default Values for Infotypes (DFINF)

The (DFINF) feature controls the determination of field values when you copy a record. Default values are usually copied from the previous record. However, in some cases, values should be re-determined using the Customizing settings.

Following are the infotypes for which values should be re-determined using the Customizing settings:

Organizational Assignment (0001):

The *Organizational Assignment* infotype displays the default value for the payroll area.

Planned Working Time (0007):

The *Planned Working Time* infotype *displays* the default value for the work schedule rule (SCHKZ).

Basic Pay (0008):

The *Basic Pay* infotype displays the default values for the pay scale type and area; it also displays the default values for the capacity utilization level and working hours per period from infotype 0007.

Configuration of Personnel Actions

Through configuration of personnel actions, you can carry out the following:

- Change the sequence of the infotypes in existing actions
- Create new actions

To create a sequence or to change the sequence of infotypes, you need to define user groups for the actions that are used in user profiles. This will allow users to view and execute the actions defined for their user group.

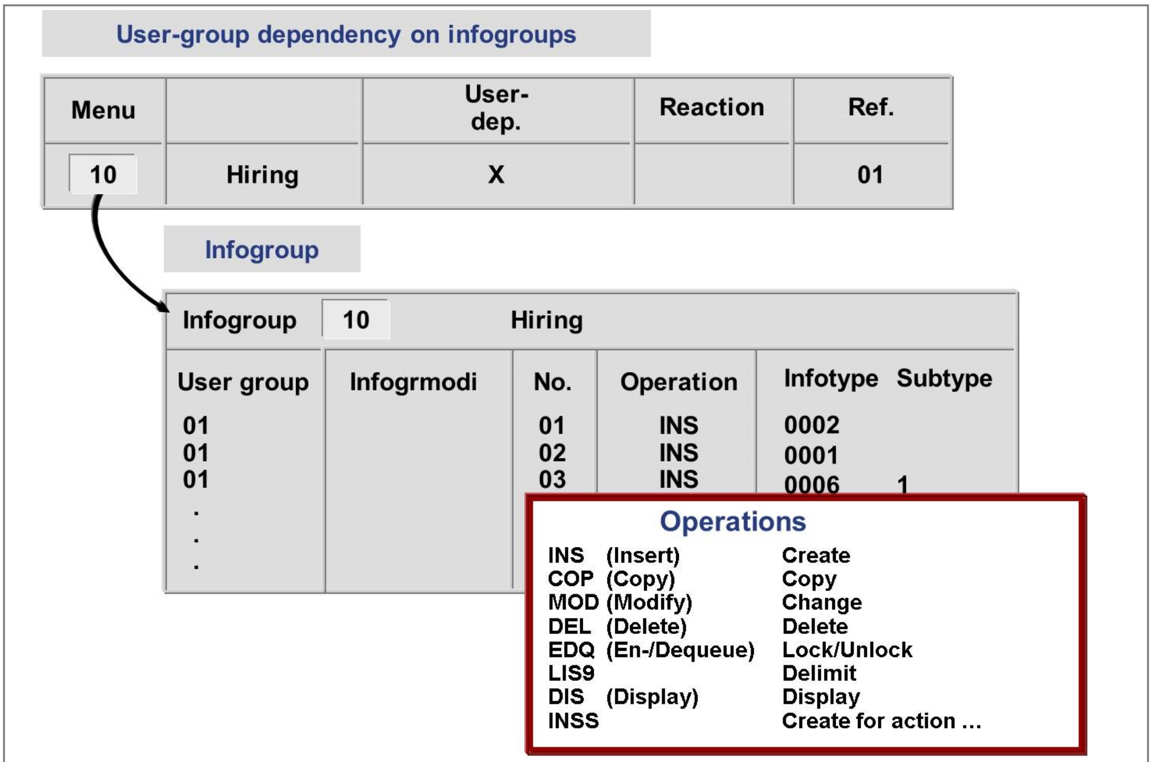


Figure 148: Determining Infogroups

In this step, you define the infogroups processed when actions are executed. This is a preparation for the next activity. You need to determine the worklist for each personnel action that is to be completed, namely the infogroup. You can define the infogroup based on the user group or user parameter (UGR).

You can also specify that the infogroup is dependent on an employee's organizational data – for example, *the company code, personnel area, personnel subarea, employee group, and employee subgroup* – by maintaining the Infogroup Modifier activity (IGMOD) feature.

In the *Operation field* , you can specify the operation that is executed with the infotype. When you perform an action and create infotype records, the system checks whether an infotype record already exists. If it does, the system switches from *Create* to *Change* .

Therefore, it generally makes sense to use the *Create* (INS) operation for a hiring action. For all other actions, you need to use the *Copy* (COP) function code. When you copy infotype records, the system suggests the start date of the action for the existing records. If no records exist for the infotype, the system switches to *Create* .

If a new record is to be created independently of existing records, choose the *Create for Actions* (INSS) operation. In this case, the system does not switch to the *Change* operation (MOD).

Determining Personnel Action Types

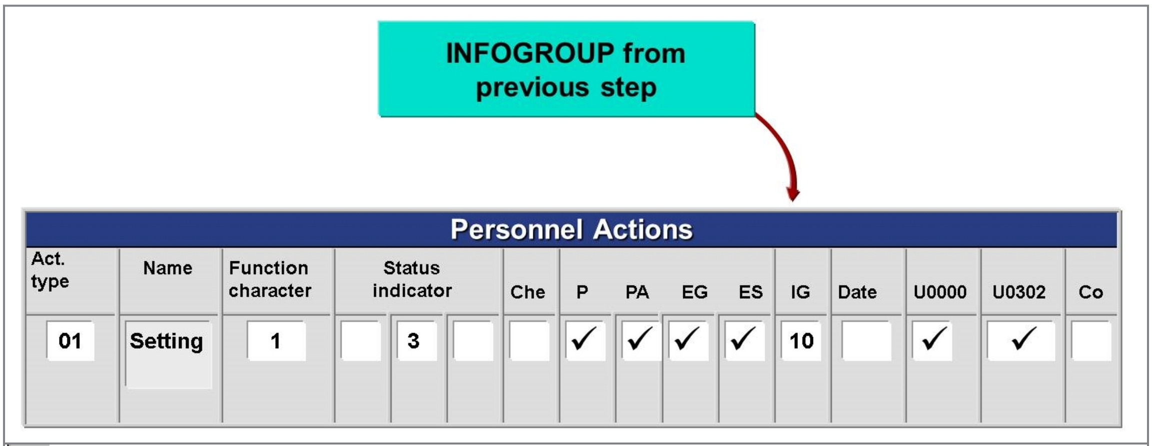


Figure 149: Determining Personnel Action Types

To create new actions, you need to perform the following steps:

1. Assign a unique number and define a name for your personnel action.
2. Use a **function character** to distinguish hiring actions from all other actions. Choose the function character 1 for initial hiring, 7 for initial hiring with data transfer from recruitment and 0 for all other actions. For global employment, there are also function characters for transferring an employee to the host country and for transferring an employee to the home country.
3. Maintain the customer-specific, employment, and special payment statuses using the *status indicator* .
4. You can only use certain actions to change the organizational assignment of an employee. In this case, you can set the indicators for the *position* , *personnel area* , *employee group* , and *employee subgroup* to represent these as ready for input in the *Personnel Actions* initial screen.
5. Use the *Date* field to define whether the date entered on the initial screen of the personnel action should be the start date of new records or the end date of old records; this is particularly useful for leaving actions.
6. Specify whether your new action should create a new *Actions* infotype record (0000).
7. Use the U0302 indicator to determine whether personnel actions are stored in the *Additional Actions* (0302) infotype.

Status Indicators

You can maintain the customer-specific, employment, and special payment statuses using the **status indicator** . The status indicators in the *Actions* infotype are automatically maintained by the system if you execute an action.

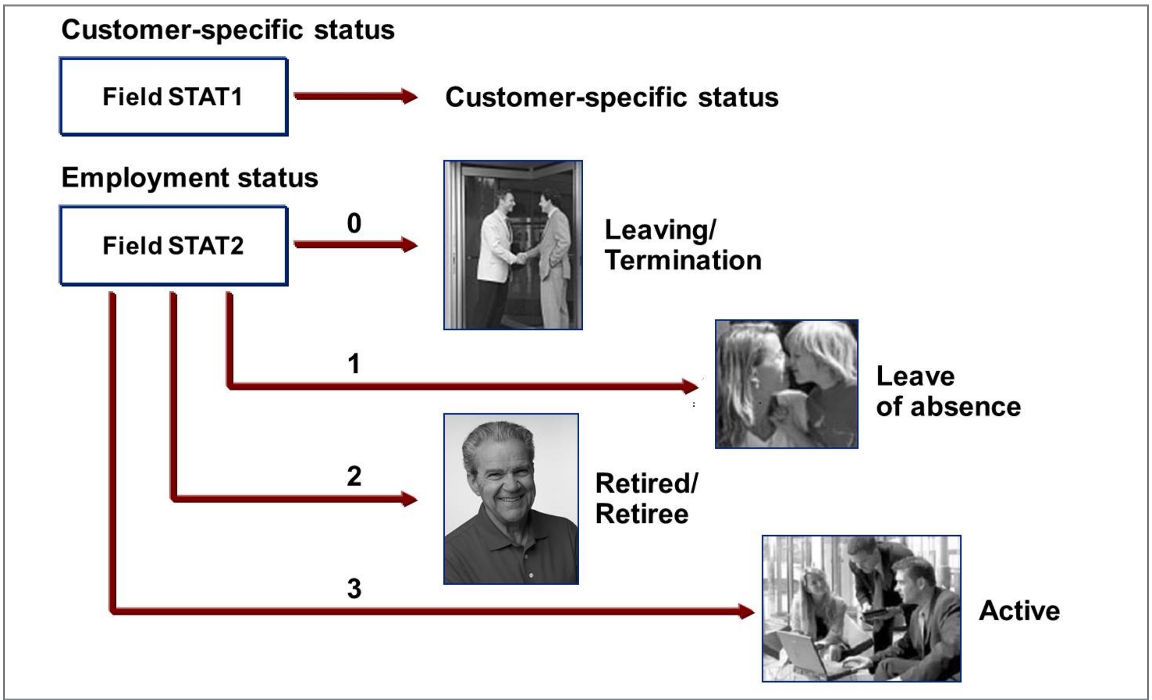


Figure 150: Change Personnel Actions Status Indicator

Status indicators have the following meaning:

Customer-specific status:

You can determine your own specific employee status.

Employment status:

Value 0:

This value indicates that the employee has left the company and should no longer be included in the payroll run. An individual retroactive run is permitted for the employee in the system.

Value 1:

This value indicates that the employee belongs to the company, but is granted leave for military service, maternity leave, or other absence reasons. In reality, most inactive contracts are not entered in the system as status changes but as absences. A payroll is run for inactive employees, but their pay can be reduced according to special factoring rules.

Value 2:

This value indicates that the employee has retired. If this person is entitled to a company pension, the system still includes this employee in the payroll run. If not, the system assigns specification 0 to this employee.

Value 3:

This value indicates that the employee belongs to the company and is active.

Special payment status:

This status is used for wage-type decisions.

Checking Status Indicators When Executing Actions

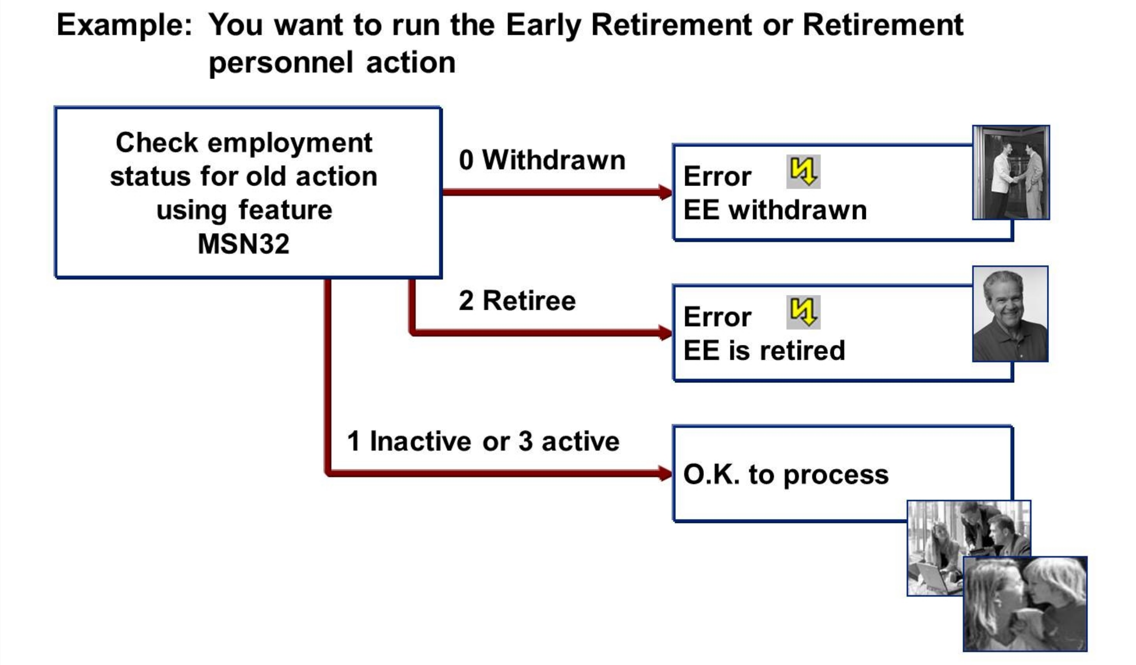


Figure 151: Checking Status Indicators When Executing Actions

When you execute a new action, the system checks whether the attributes of the new action match those of the previous action.

This check is controlled by the following features:

- MSN20 for leaving
- MSN21 for hiring
- MSN32 for early retirement or retirement

These features check the old actions against the new, proposed action. For example, if you want to execute an action to retire an employee, the action checks for the MSN32 feature.

The old action can be checked by the following status indicators:

- STAT2 = 0: It indicates that there is an error because the employee has already left the company.
- STAT2 = 2: It indicates that there is an error because the employee has already retired.
- STAT2 = 3: It indicates that the processing continues because the employee is active.

Reasons for Personnel Action Types

The reason for action indicates why the action was triggered. You can use this information to evaluate why employees leave or why they are transferred.

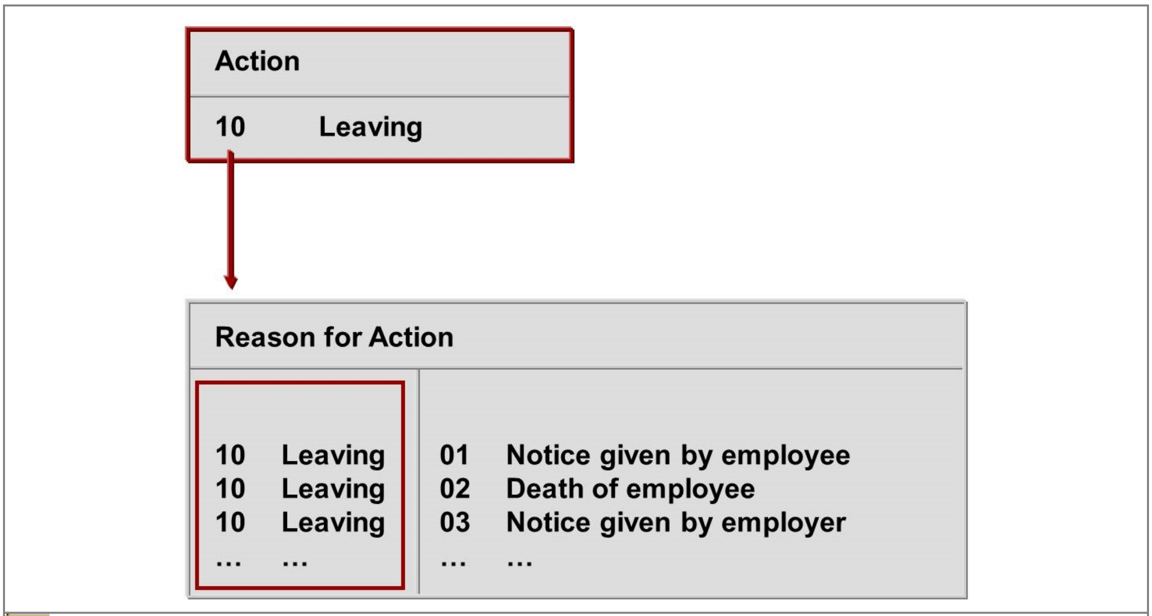


Figure 152: Defining Reasons for Personnel Action Types

You must always enter at least one reason for each action, even if the entry is just a blank space.

Actions Menu

You need to include the personnel actions that you have just defined in the *Personnel Actions* menu. You can also define this menu so that it is dependent on a user group or user parameter (*UGR*).

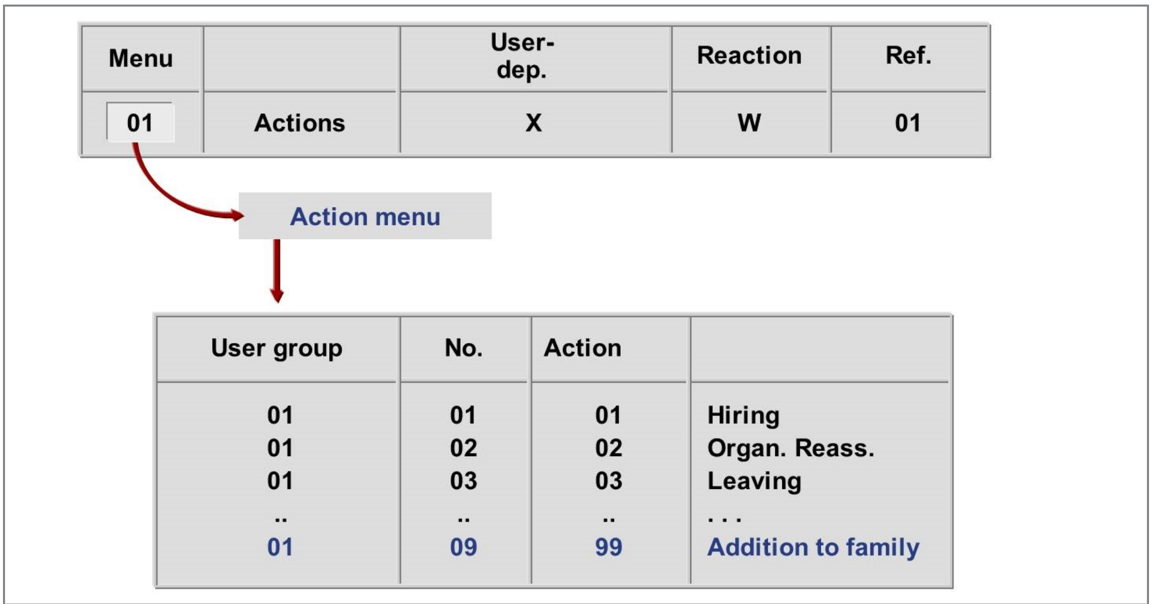


Figure 153: Changing the Actions Menu

If there is no entry in the table for your user's user group or if you have not maintained your user group, the system displays the menu for the reference user group.

User Group Dependency of Actions Menu

You need to specify whether menu 01 for personnel actions should be dependent on the user group. You also need to specify how the system responds if the user has not maintained the user group and a reference user group so that the menu can be created.

Actions in the Actions Menu

You need to enter the new action for the user group and define the location where the action will appear in the menu (and the specific sequence number).

LESSON SUMMARY

You should now be able to:

- Set up personnel actions to meet master data administration requirements
- Verify the status indicators of a personnel action
- Identify the reasons for using personnel action types

Unit 14
Lesson 2

Reviewing Additional Actions

LESSON OVERVIEW

This lesson explains how to record all the action types and the corresponding action reasons for each employee using the Additional Actions infotype.

Business Example:

As part of Human Resource management, you need to record all the action types and the corresponding action reasons for each employee in your company. For this reason, you require the following knowledge:

- An understanding of the Additional Actions infotype

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Outline how multiple actions processed on the same day are tracked

Additional Actions Infotype

The *Additional Actions* (0302) infotype allows you to log all personnel actions that you execute for an employee in a single day. The log records all the action types and the corresponding action reasons run for the employee according to a key date.

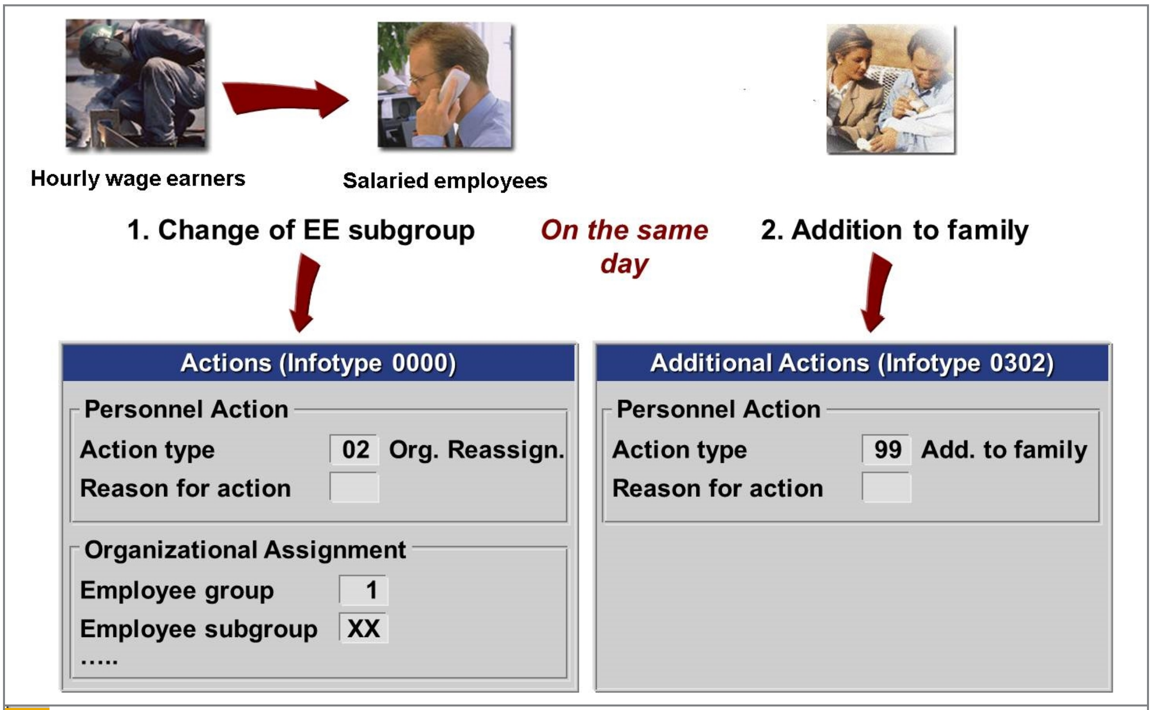


Figure 154: Additional Actions

All programs that interpret an employee's status, evaluate the *Actions* infotype (0000) exclusively. The *Actions* infotype (0000) has the time constraint 1, which means that only one valid *Actions* infotype record can exist in the system at any one time for the employee's activity in the company.

Additional Actions in *Actions* Infotype

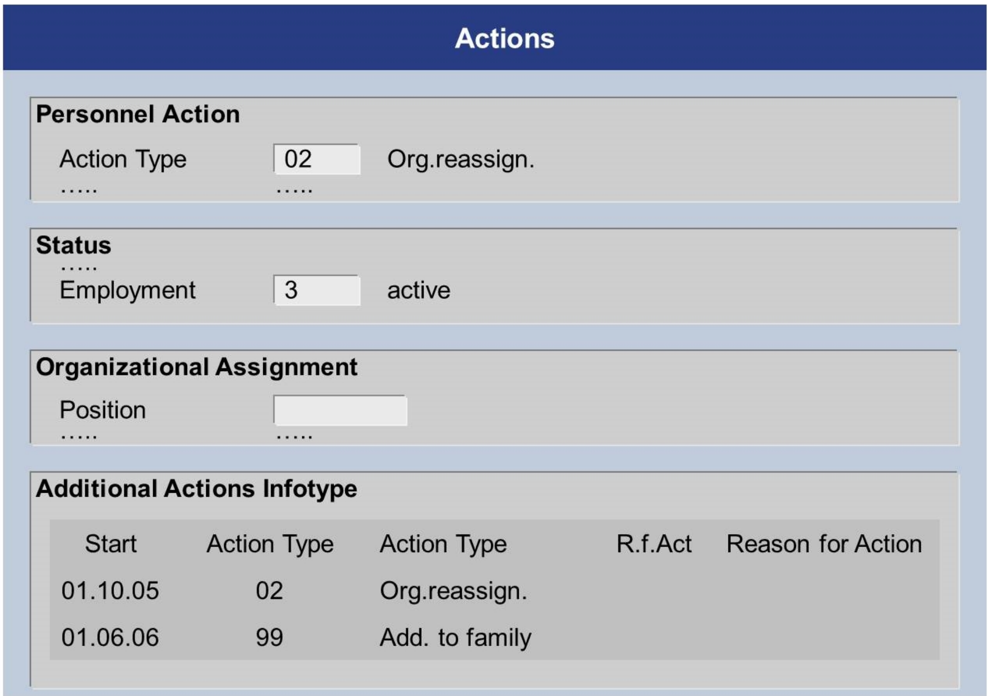


Figure 155: Displaying Additional Actions in Actions Infotype

You need to ensure that only one personnel action is saved in the *Actions* infotype (0000) per day. In Customizing, you can specify which action type should be stored for an employee per day if more than one personnel action was run for the employee on the same day. Usually, you should choose personnel actions whose status is changing, such as the *Leaving* personnel action, which causes a status change from *active* to *left* . The other actions are stored in IT0302.

Only action types and action reasons are saved in the *Additional Actions* infotype (0302).

Hint:
You cannot execute two different status-changing personnel actions for one employee on the same day. For example, you cannot run a *Leaving* action and an *early retirement* or *retirement* action on the same day. In this case, one action would overwrite the other.

If you want to use the *Additional Actions* (0302) infotype, you can use report RPUEVSUP to make the necessary entries.

LESSON SUMMARY

You should now be able to:

- Outline how multiple actions processed on the same day are tracked

Unit 14
Lesson 3

Configuring Personnel Actions

LESSON OVERVIEW

This lesson explains how to configure personnel actions.

Business Example

As part of the HR project team, you are responsible for ensuring personnel processes can be completed efficiently. Using personnel actions, required infotypes are automatically displyed to the user in a specific sequence. You must set up a personnel action. For this reason, you require the following knowledge:

- An understanding of personnel actions

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Configure personnel actions

Personnel Actions

Personnel procedures, such as employee recruitment, organizational reassignment, or an employee resignation are represented by individual personnel actions.

Employee Leaves the Company

Figure 156: Employee Leaves the Company

When an employee leaves the company, the system performs in the following manner:

- You cannot change certain infotypes because the system needs them to create a history. However, you must delimit some infotype records when an employee leaves the company.
- His or her personnel number cannot be deleted.
- A new *Actions* infotype record (0000) is created for the leaving action that stores the leaving date and the reason for leaving. You must enter the reason for leaving for statistics and reporting purposes.
- When an employee leaves the company, the system automatically changes the employment status to 0 (Based on your configuration in the actions). Payroll recognizes this status, and does not select this employee for inclusion in the subsequent payroll period. The system also does not select employees with status 0 for several other evaluations.

You must leave organizational data, personal data, addresses, and basic payroll data in the system. You cannot delimit the data records, as the employee may still receive payments (for overtime or leave compensation, for example), or may still have to be contacted after the last payroll has been run. In addition to this, this data is also used for reporting purposes.

Note:
You cannot delimit the *Basic Pay* infotype (0008). If you delimit this infotype, the system cannot perform retroactive accounting correctly. If you do want to compensate an employee once he or she has left, then you can use either of the following infotypes:

- *Recurring Payments* and *Deductions* (0014)
- *Additional Payments* (0015)

Employee Reentry

Figure 157: Employee Reenters the Company

The SAP system uses the term **reentry** for employees who have left the company and then reenter the same company.

When an employee reenters the company, the system performs in the following manner:

- The system uses the previous personnel number for such a personnel action.
- The system sets the employment status to 3 (for active) in the *Actions* infotype (0000) when you run the personnel reentry action.
- The system creates new infotype records for all infotypes delimited when the employee originally left the company and uses the reentry date as the start date.

Retiree with Company Pension

Early Retirement or Retirement personnel action

- **Status change in *Actions* infotype, employment status set to *Retiree***
- **Employee group *Retiree* and employee subgroup *Retiree***
- **Company pension entered into the *Basic Pay* infotype**

Figure 158: Retiree with Company Pension

If one of the active employees retires or goes into early retirement, the system automatically sets the status field in the *Actions* infotype to 2 for retiree.

You must assign the employees to employee group *Retiree* and to employee subgroup *Retiree* . To pay the pension, simply enter the corresponding wage type in the *Basic Pay* infotype.

If an employee who left the company years ago is now entitled to a company pension, you must first run a reentry action, followed by the retirement action.

Retiree Working as a Night Shift Security Guard

Figure 159: Retiree Working as a Night Shift Security Guard

If an employee entitled to a company pension works as a night shift security guard in your company, for example, you must hire him or her with a new personnel number.

This ensures the following:

- Employee receives employment status 3 (active) with the second personnel number.
- The system assigns the employee to the employee group *Active* and the employee subgroup *Night shift security guard* .

Hint:
To refer to the previous personnel number, use the *Reference personnel number* field in the *Organizational Assignment* infotype. This field is available when you perform a hiring action.

Note:
You need to create a second personnel number because the money earned as a night shift security guard is taxed according to different tax guidelines.

LESSON SUMMARY

You should now be able to:

- Configure personnel actions

Learning Assessment

1. Which of the following features are used to compare the attributes of the new action with previous one?

   Choose the correct answers.

   - [ ] A MSN20
   - [ ] B MSN21
   - [ ] C MSN24
   - [ ] D MSN32

2. The employee Status Value 2 indicates that the employee belongs to the company and is active.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

3. Which of the following status indicators checks for the retired employee?

   Choose the correct answer.

   - [ ] A STAT2 = 0
   - [ ] B STAT1 = 1
   - [ ] C STAT2 = 2
   - [ ] D STAT2 = 3
   - [ ] E STAT1 = 2

4. You cannot execute two different status-changing personnel actions for one employee on the same day.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

5. Which of the following infotype is created for the leaving action that stores the leaving date and the reason for leaving of the employee?

   Choose the correct answer.

   - [ ] A *Actions* infotype record (0001)
   - [ ] B *Actions* infotype record (0000)
   - [ ] C *Actions* infotype record (0002)

6. For active employees, the employment status is set to 3 by the system.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

7. A new personnel number is required to hire an employee as a night shift security guard who is already entitled to a company pension due to his or her earlier employment with the Company.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

8. The system cannot perform retroactive accounting correctly if the *Basic Pay* infotype (0008) is delimited.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. Which of the following features are used to compare the attributes of the new action with previous one?

   Choose the correct answers.

   - [X] A MSN20
   - [X] B MSN21
   - [ ] C MSN24
   - [X] D MSN32

2. The employee Status Value 2 indicates that the employee belongs to the company and is active.

   Determine whether this statement is true or false.

   - [ ] True
   - [X] False

3. Which of the following status indicators checks for the retired employee?

   Choose the correct answer.

   - [ ] A STAT2 = 0
   - [ ] B STAT1 = 1
   - [X] C STAT2 = 2
   - [ ] D STAT2 = 3
   - [ ] E STAT1 = 2

4. You cannot execute two different status-changing personnel actions for one employee on the same day.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

5. Which of the following infotype is created for the leaving action that stores the leaving date and the reason for leaving of the employee?

   Choose the correct answer.

   - [ ] A *Actions* infotype record (0001)
   - [X] B *Actions* infotype record (0000)
   - [ ] C *Actions* infotype record (0002)

6. For active employees, the employment status is set to 3 by the system.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

7. A new personnel number is required to hire an employee as a night shift security guard who is already entitled to a company pension due to his or her earlier employment with the Company.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

8. The system cannot perform retroactive accounting correctly if the *Basic Pay* infotype (0008) is delimited.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

UNIT 15 Dynamic Actions

UNIT OBJECTIVES

- Explain how dynamic actions trigger follow-up activities
- Set up dynamic actions to track activities

Unit 15
Lesson 1

Triggering Follow-Up Activities with Dynamic Actions

LESSON OVERVIEW

This lesson explains how dynamic actions trigger follow-up activities. It also covers how to set up dynamic actions to track activities.

Business Example

As a personnel administrator, you want to be notified by an SAP Office mail when a specific action occurs in the system. For this reason, you require the following knowledge:

- An understanding of actions
- An understanding of additional infotypes
- An understanding of the e-mails generated through dynamic actions

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Explain how dynamic actions trigger follow-up activities
- Set up dynamic actions to track activities

Functions of Dynamic Actions

When certain events occur, dynamic actions trigger actions in the SAP system such as:

- Maintain another infotype record (I)
- Send an e-mail through SAPOffice (M)

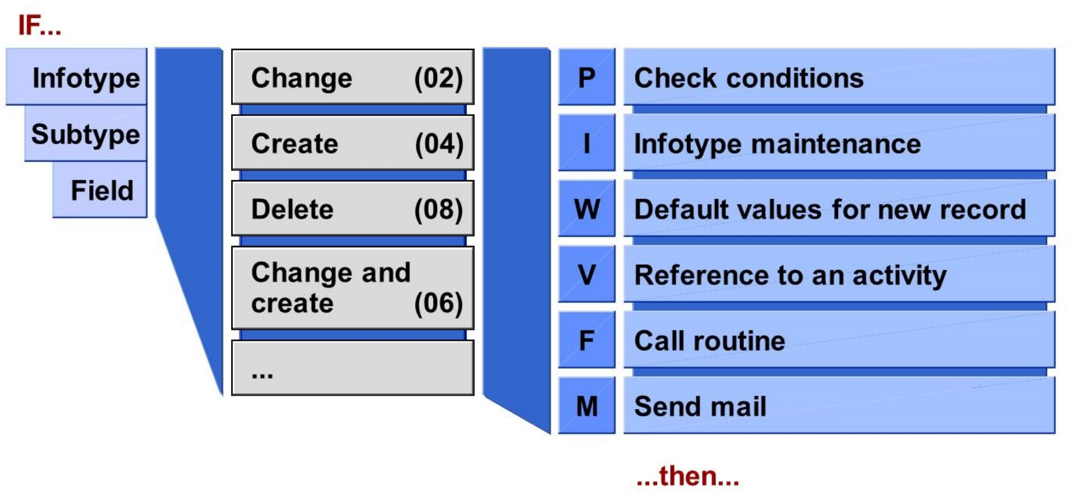


Figure 160: Dynamic Actions

For a particular action to be executed by the system, you need to determine whether the action is initiated when you perform *Change* (02), *Insert* (04), or *Delete* (08) data in the infotype record. The system can be set up so that it recognizes AND/OR situations. The values for *Change* , *Create* , or *Delete* can also be added. For example, if the value of the maintenance operation is 06, it means that an action is performed if the current record is changed or if it is expanded (02 change + 04 create).

In the function part (of the table), you can enter plausibility checks for actions, for example, old and new field values. Finally, you can formulate standard values for a record that has been added.

Hint:
If you use Recruitment, you must make sure that the system triggers dynamic actions for the correct application. To achieve this, you must first read the transaction class:

- PSPAR-TCLAS = "A" for Personnel Administration
- PSPAR-TCLAS = "B" for Recruitment

Infotypes Used in Actions

You can use dynamic actions to control actions that are initiated when maintaining an infotype record.

An action can be any of the following:

- Maintaining an additional infotype record
- Sending mail using SAPOffice
- Executing a routine

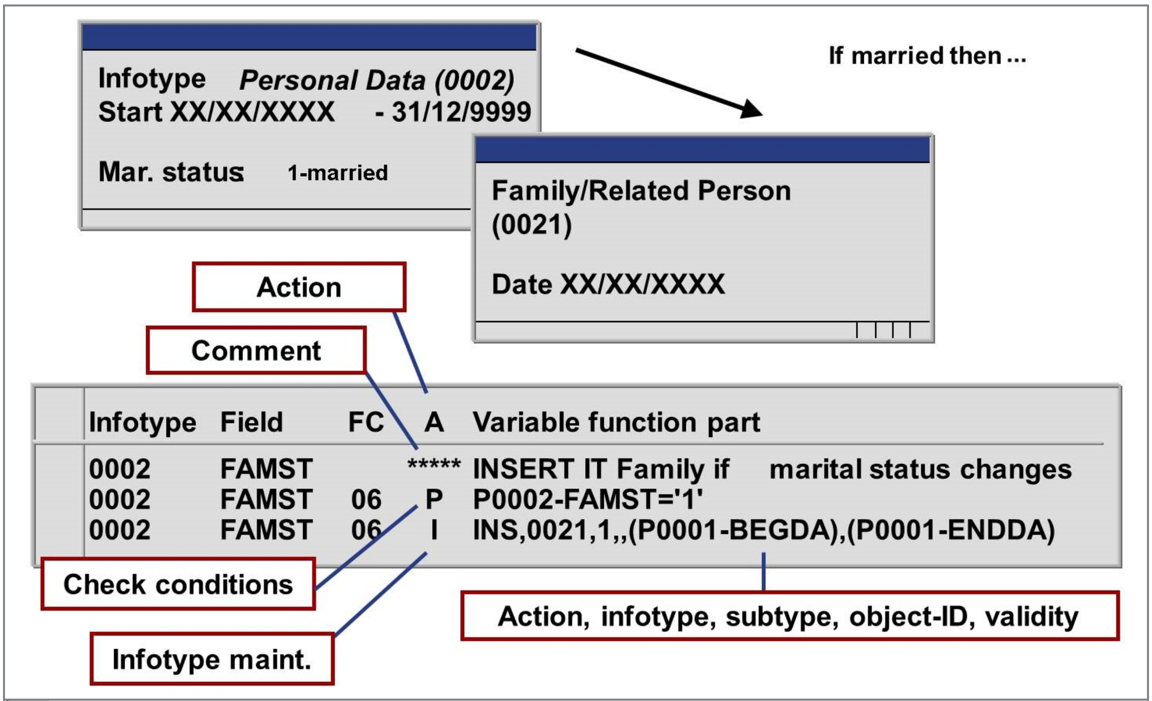


Figure 161: Dynamic Actions – Maintaining Additional Infotypes

An employee borrowing a laptop is an example of executing a dynamic action. In this case, as a personnel administrator, you require the *Monitoring of Task* infotype to appear automatically so that you can maintain it.

Dynamic Action E-Mails

When you change an infotype record, you can use the dynamic action mail function in SAPOffice to automatically inform others of this change.

For example, you change an employee's *Organizational Assignment* infotype (0001). In this case, certain system users, such as the administrator or the head of the department, need to be informed of these changes.

Defining Administrators and Administrator Groups

In the Organizational Assignment (0001) infotype, you have the following input options for the personnel administrator:

- Human Resources
- Time Recording
- Payroll

A link to these administrators can be created in dynamic actions so that if certain changes are made in the employee records of an administrator, they automatically receive an e-mail through SAPOffice mail.

The PINCH feature reads the administrator group from the Customizing table...

Group	Payroll admin.	Name of administrator	FofAddr	Tel.no.	SAP Name
0001	001	Administrator 1			HRADMIN-001
0001	002	Administrator 2			HRADMIN-002
0001	003	Administrator 3			HRADMIN-003
0001	VLZ	Judith Lightfoot	Mrs		LIGHTFOOT
0001	Z01	Fred Ford			FORD
0001	Z02	Carl Crane			CRANE
0001	Z03	Maria Martinez	Mrs	8715	MARTINEZ

...and proposes it to infotype.

Org. Assignment (0001)

Administrator group 0001
Personnel administrator Fred Ford

Figure 162: Defining Administrators and Administrator Groups

The SAP ERP 6.0 system has a dynamic action, whereby if an administrator makes changes in the IT0001 record of an employee, both the new and old administrators are informed using SAPOffice mail.

Hint:
Creating a link to the administrator is not one of the workflow's functions since no action needs to be executed. It merely notifies the administrator that a change has occurred in an employee record.

LESSON SUMMARY

You should now be able to:

- Explain how dynamic actions trigger follow-up activities
- Set up dynamic actions to track activities

Learning Assessment

1. You can send an e-mail to the concerned administrator through dynamic actions if the administrators are changed for an employee in the *Organizational Assignment* Infotype (0001).

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. Identify the transaction class for personnel administration.

   Choose the correct answer.

   - [ ] A B
   - [ ] B A
   - [ ] C D

3. By using relevant options, you can specify whether an e-mail should be moved to the outbox after it has been sent.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. You can send an e-mail to the concerned administrator through dynamic actions if the administrators are changed for an employee in the *Organizational Assignment* Infotype (0001).

   Determine whether this statement is true or false.

   [X] True

   [ ] False

2. Identify the transaction class for personnel administration.

   Choose the correct answer.

   [ ] A B

   [X] B A

   [ ] C D

3. By using relevant options, you can specify whether an e-mail should be moved to the outbox after it has been sent.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

UNIT 16 Case Study: Configuration of Master Data

UNIT OBJECTIVES

- Configure master data

Unit 16
Lesson 1

Configuring Master Data

LESSON OVERVIEW

This lesson will help you assess how much you have learned during this course.

Business Example

As a member of the configuration team, you are responsible for the configuration of master data.

> Note:
> This case study is divided into individual exercises. With the exception of the first exercise, all exercises are optional. If you find that you do not have enough time to complete all the exercises, concentrate on those exercises that are most relevant to your business practice.

The goal of the case study is to test your knowledge on the subject.

First try to complete the exercises without any additional help. If you have any difficulties, refer to the solutions at the end of the relevant exercise. Should you still have difficulties, your instructor is, of course, available.

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Configure master data

Master Data Configuration Case Study

Your company has purchased a new subsidiary which manufactures and sells mopeds. As a result of this purchase, your HCM structures must be adjusted. Your task is to complete the required configuration to set up this new subsidiary.

LESSON SUMMARY

You should now be able to:

- Configure master data